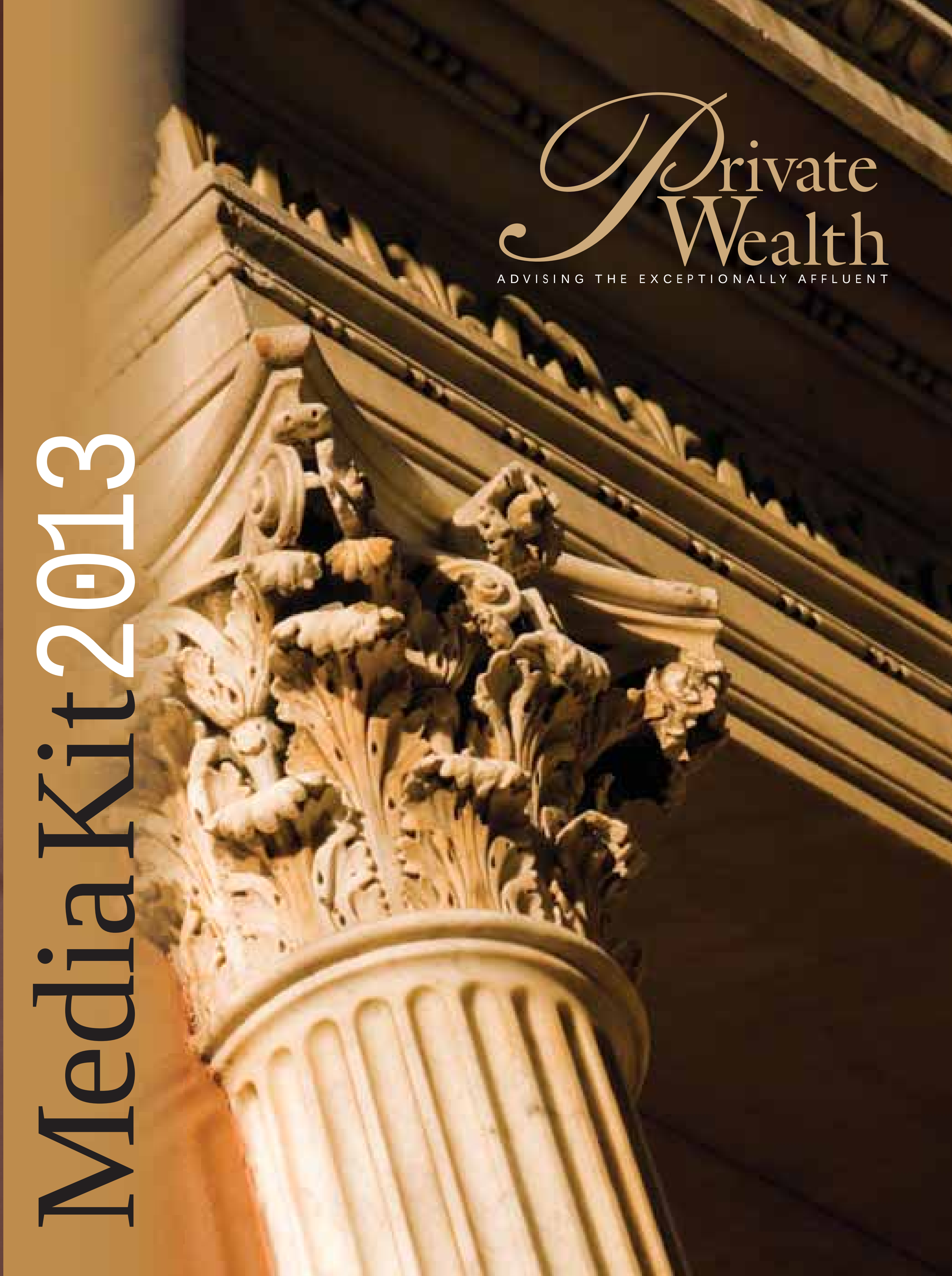
Private Wealth

ADVISING THE EXCEPTIONALLY AFFLUENT

Media Kit 2013



MISSION STATEMENT

Private Wealth is the first and only magazine to exclusively target wealth and family office advisors who service the financial, legal, insurance/risk management and lifestyle needs of the ultra-affluent—those with a minimum net worth of $10 million. Collectively, these advisors to the exceptionally affluent have the greatest purchasing power in the world and thus are the most desirable prospects for financial, legal and luxury brand providers.

Private Wealth delivers specialized strategies to these collaborators who work with very wealthy clients by providing targeted, cutting-edge news specific to the unique financial and lifestyle needs of their clients. *PW* also addresses the insights, processes and techniques that make for a successful practice focused on the ultra-affluent.

EXECUTIVE EDITORIAL TEAM

Evan Simonoff – Editorial Director

Evan has spent the last 25 years as an editor and a reporter in the financial services market. Prior to 2000, he spent ten years as Editor-in-Chief of *Financial Planning* magazine and has been recognized as an expert on personal finance and investments.

Hannah Shaw Grove — Executive Editor

Hannah is an expert on the demographics, psychographics and financial behavior of high-net-worth individuals and their advisors. She spent more than 15 years in the financial services industry working closely with institutional and high-net-worth investors to develop sophisticated financial planning and servicing solutions.

Russ Alan Prince – Editor-At-Large

Russ is the President of Prince & Associates Inc.—a leading market research firm specializing in global private wealth. He is a highly regarded consultant on strategic, profitability and structural business issues with ultra-high-net-worth individuals and elite advisors.

Thomas Kostigen – Editor-At-Large

Tom is a former Bloomberg News editor. His journalism has appeared in numerous publications, including *The Financial Times, The Washington Post, The Chicago Tribune, The Wall Street Journal, The Los Angeles Times* magazine, and others. He also writes the Impact Investor column for Dow Jones MarketWatch and *The Wall Street Journal* Digital Network. He is a *New York Times* best-selling author.

Raymond Fazzi – Managing Editor

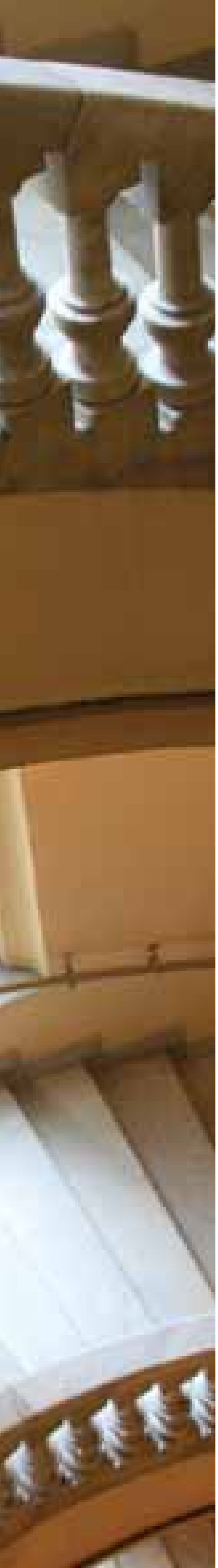
Ray has 25 years experience as a professional journalist and is a senior editor of *Financial Advisor* magazine. He joined Charter Financial Publishing in 2000, where he has covered all aspects of the financial advisory industry, including practice management, compliance and investment issues.

TARGET AUDIENCE

(circulation: 30,000)

Family Offices | Private Bankers | High-End RIAs/Wealth Advisors | Estate Planners | Trust Officers
Accountants | Attorneys | Asset and Investment Managers | Insurance and Risk Management Specialists
Philanthropic Advisors | Family Business Consultants | Luxury and Concierge Service Providers

Note: All segments of the target audience are advising or influencing wealthy clients and/or families with a minimum net worth of $10 million



IN EVERY ISSUE

Features
In-depth articles on the topical issues, trends and innovations relevant to private wealth professionals.

Research
The latest proprietary and syndicated research on the ultra-high-net-worth market and the organizations and advisors that serve it.

Investments
Perspectives on the sophisticated products, structures and strategies utilized to help wealthy clients achieve specific investment and tax management objectives.

The Client Experience
We'll explore and contrast various offerings and approaches in the area of client service and experience employed by private banks, trust companies, family offices, broker/dealers, custodians and the other product and service providers of products who cater to the exceptionally affluent.

Asset Management Spotlight
An asset management firm specializing in serving advisors and other centers of influence to exceptionally affluent clients will be profiled. In particular, we'll explore the investment management approach, along with unique, supportive private wealth management platforms.

Lifestyle Services
Insider information on the various aspects and elements of maintaining a life of luxury.

Life Insurance/Risk Management
Technical articles on the advanced applications of life insurance for long-term planning and financial problem-solving.

Estate Planning
Insights on the cutting-edge techniques used to design comprehensive, customized plans for clients with significant assets.

Wealth Protection
Details on the defensive and legal measures used to help the wealthy secure their hard and soft assets.

Business Development
Discussions of the best practices and systematized processes that translate into a successful practice focused on the ultra-affluent.

Technology
More than ever before, family offices, wealth advisors and other providers of services are relying on technology to help manage the complicated lives of wealthy individuals and families. *Private Wealth* has assembled a team of expert contributors to keep our readers on the cutting edge.

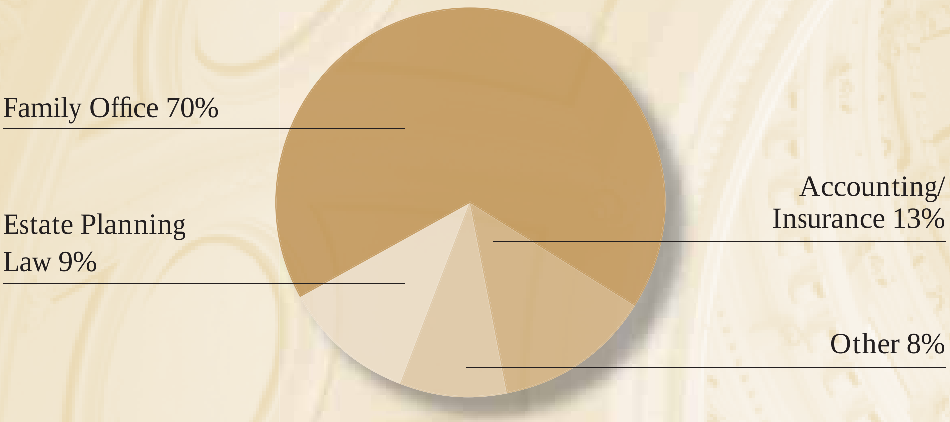
TARGETED DIRECTORIES AND SINGLE-DAY WORKSHOPS

In addition to our regular editorial departments, every issue of *Priveate Wealth* will include expanded coverage, along with a Directory of Providers, pertaining to one of the following subjects: Estate Planning Services, Family Office and Wealth Advisory Firms, Family Office/Wealth Advisory Technology Providers and Impact Investing.

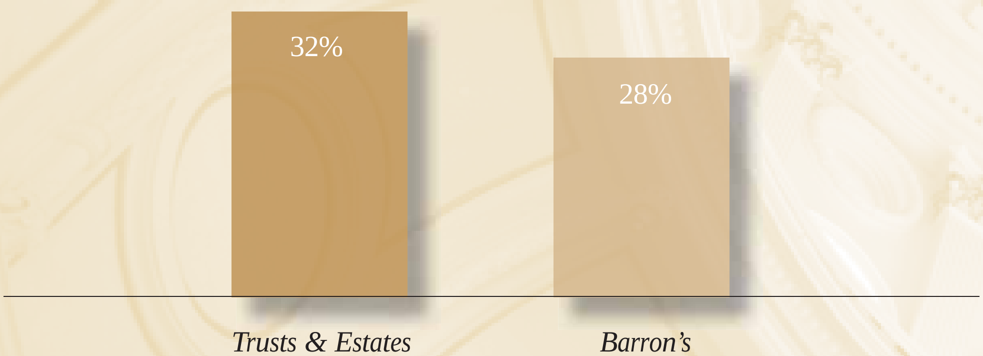
The following single-day workshops will be offered throughout the year: Creating A Multi-Client Family Office Practice and Impact Investing.

TARGETED READERSHIP

Types Of Firms Readers Own Or Work For



Publications Readers Receive In Addition To Private Wealth



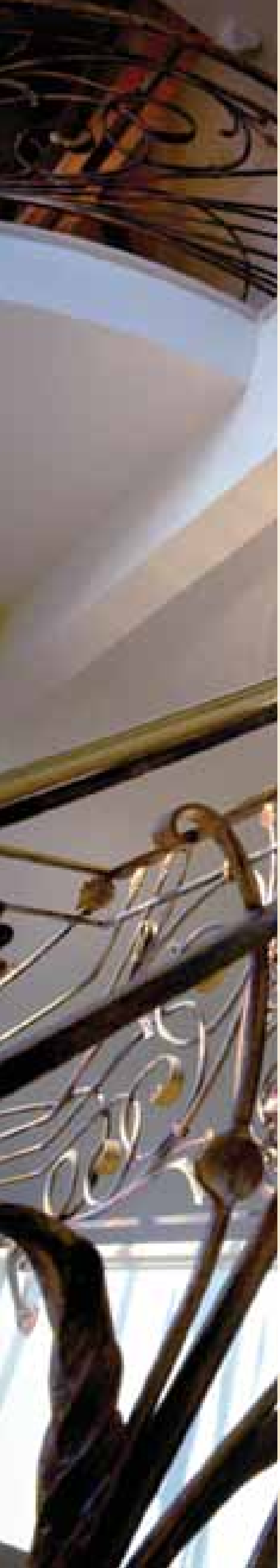
Tenure In The Financial Services Industry

Readers With 10 or More Years' Experience	84%
Average Years in the Industry	22 Years

Average Number of Clients Readers *Personally* Advise	81
Average Client Account Value Per Reader	$22 Million
Average Amount of Assets Readers *Personally* Manage	$379 Million

Source: 2011 Subscriber Study, Signet Research

	Bonus Distribution	Space	Materials	Mail Date
JANUARY/FEBRUARY				
• Impact Investing • Private Equity	• **Inside ETFs Conference** • 2013 Heckerling Annual Conference • AM&AA Winter Conference • IMCA NY Consultants • TD Ameritrade Institutional	11/30/12	12/6/12	1/2/13
MARCH/APRIL				
• Alternative Investments • Concierge Services	• ***Financial Advisor* Retirement Symposium** • **Innovative Real Estate Strategies** • AALU Annual Meeting • ABA Wealth Management & Trust Conference • IMCA National Conference	2/7/13	2/14/13	3/8/13
MAY/JUNE				
• Personal Property Insurance • Trust and Estate Planning	• Pershing INSITE • Morningstar Investment Conference	4/5/13	4/12/13	5/9/13
JULY/AUGUST				
• **Impact Investing Directory** • Practice Management • Multigenerational Services	• **Innovative Alternative Strategies Conference** • **Impact Investing Workshop** • **Alts University Workshop**	6/7/13	6/14/13	7/9/13
SEPTEMBER/OCTOBER				
• **Multifamily Office Update and Directory of MFO/Wealth Advisory Services** • Lifestyle Management • Legacy Planning	• **The Fiduciary Gatekeeper Research Manager Summit** • **MFO Conference** • IMCA Advanced Wealth Conference	8/7/13	8/14/13	9/7/13
NOVEMBER/DECEMBER				
• **Family Office/Wealth Advisory Technology Guide and Directory of Providers** • Tax and Management • Philanthropy	• Schwab Impact	10/7/13	10/14/13	11/8/13



2013 Display Advertising Rates

	1X	3X	6X	12X	18X
BLACK &					
Full page	$6,595	$6,195	$5,795	$5,495	$5,195
2/3 page	5,895	5,595	4,995	4,995	4,595
1/2 page	5,095	4,695	4,295	3,995	3,695
1/3 page	4,195	3,795	3,495	3,195	2,895
Spread	11,895	11,195	10,595	9,995	9,395
FOUR-COLOR					
Full page	$7,495	$6,995	$6,595	$6,295	$5,995
2/3 page	6,895	6,495	6,195	5,895	5,595
1/2 page	5,995	5,595	5,195	4,895	4,595
1/3 page	5,095	4,795	4,495	4,195	3,895
Spread	13,195	12,595	11,995	11,395	10,795
Cover 2		$9,295	$8,895	$8,995	
Cover 3		8,595	8,295	7,995	
Cover 4		9,595	9,295	8,995	

Add $300 for spot colors
Preferred or special positions — add 10%
All rates are commissionable

Bleed — add 10%
Inserts — rates available upon request

AD SIZES

Full Page

Trim	8⅛" x 10⅞"
Bleed	8⅜" x 11⅛"

Spreads

Trim	16¼" x 10⅞"
Bleed	16½" x 11⅛"

Live Area

Covers and full pages	7⅝" x 10⅜"
Spreads	15¾" x 10⅜"
2/3 horizontal	7" x 6"
2/3 vertical	4½" x 9¾"
1/2 horizontal	7" x 4½"
1/2 vertical	4½" x 7"
1/3 square	4½" x 4½"
1/3 horizontal	7" x 3"
1/3 vertical	2¼" x 9¾"

Digital File Specifications for Print

Media
- E-mail (maximum file size 5 MB), CD/DVD Rom or FTP
- Please label CDs/e-mail with name of advertiser and issue date

Preferred format: PDF
- Files should be 100% complete with all hi-resolution images and fonts embedded.
- Color files must be CMYK format. Spot colors will be converted to process unless indicated otherwise.
- PDF documents must contain Type 1 postscript fonts. Truetype and Multiple Master fonts are not supported.
- Page files should be built to the trim size with the bleed area extending 1/8" beyond the trim. Keep all text and images within the live area (1/4" in from trim).
- Images should be TIFF or EPS format in CMYK or Grayscale. Do not embedd ICC profile with images. Total ink density should not exceed 300%.
- Offset printer's marks at 12 points from trim so they do not appear within the print or bleed area.

Proofs
All color ads must include a SWO P standard color proof. All b/w ads must include a composite laser.

FTP Instructions
Go to www.pw-mag.com and click on the "FTP Site" at the bottom of the page. User name: ads_pw; Password: pwuploads. Please send Aimee Melli (amelli@pw-mag.com) e-mail with the file name and issue date once the ad has been uploaded to the site.

Ad material questions? Call Aimee Melli at 732-450-8866, ext. 15 or e-mail: amelli@pw-mag.com
Send ad materials to: *Private Wealth*, Production Department, 499 Broad Street, Suite 120, Shrewsbury, NJ 07702

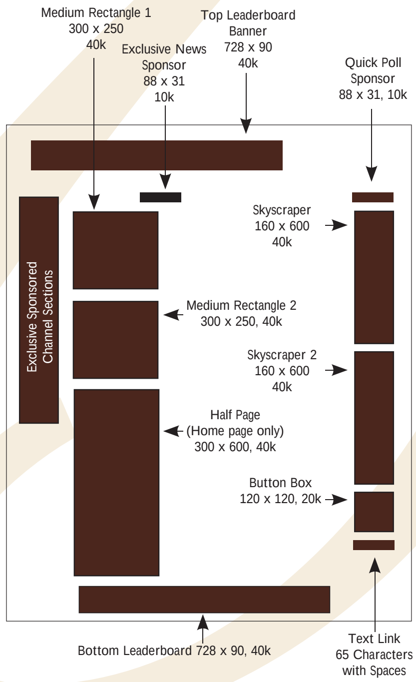
For more information, contact: Andy Pedersen at 732.450.8866, ext. 34 or apedersen@pw-mag.com

DIGITAL OPPORTUNITIES

PW-mag.com offers you an excellent way to reach advisors and centers of influence to the super-affluent. Why not capitalize on your brand awareness while complementing your print component by advertising on www.pw-mag.com?

AD UNIT	1x MONTHLY RATE
Interstitial (640x480)	$2,595
Exclusive Sponsored Channel Section: *Top Leaderboard, Medium Rectangle, Skyscraper, Bottom Leaderboard, Logo (120x60) on home page, Logo (120x60) on, monthly channel blast*	$2,595
Top Leaderboard Banner	$2,095

AD UNIT	1x MONTHLY RATE
Medium Rectangle 1	$1,795
Skyscraper 1	$1,795
Medium Rectangle 2	$1,495
Skyscraper 2	$1,495
Exclusive Quick Poll Sponsor	$1,295
Half Page (Home Page Only)	$1,295
Button Box	$995
Text Link	$895
Bottom Leaderboard	$795



Exclusive Sponsored Channels: Deliver your marketing message to your target audience by sponsoring an exclusive channel of your choice.

Alternative Investments | Arts and Culture | Estate Planning
Insurance | Investing | Lifestyles | Practice Development
Real Estate/REITs | Research | Technology | Wealth Protection

E-directs. A customized marketing message will be sent to our list of approximately 22,500 online subscribers. HTML and text versions are permitted, and *Private Wealth* will track the success of the e-direct by providing a status report one week after the e-direct as been e-mailed.

Rate: $2,995

Specs:
- HTML not to exceed 600 pixels across the content area, mapping in the html code is not recommended, embedded images, cannot accept Word files converted to HTML. (Please take in account Microsoft Outlook 2007 limitations when building html files for e-mail distribution. *Private Wealth* magazine will not alter HTML code to render in Outlook 2007.)
- E-direct file size should not exceed 60k.
- There is a 150,000 character limit to custom HTML/XHTML e-mails.
- HTML and text files to be received 5 business days prior to flight date.

Styling:
- Direct element HTML styling is needed for elements that do not fall under the global style or inline styling that is different from controlled content.
- Any href's that have different styling than the global style will not hold in-line styling. Styling for href's needs to be coded as standard HTML Font styling. i.e. <font color="#999999"><font style="strong"> etc

PW News is *Private Wealth* magazine's weekly electronic newsletter, which is sent to approximately 51,000 online subscribers every Monday. *PW News* is the source of breaking news and events that directly impact professionals focused exclusively on meeting the financial, legal and lifestyle demands of the ultra-high-net-worth clients. Three banner placements are available in the weekly edition and inventory is based on availability.

BANNER RATES	
Top Leaderboard Banner (728x90)	$2,095
Medium Rectangle 1 (300x250)	$1,795
Medium Rectangle 2 (300x250)	$1,495

Specs:
-File Format – GIF/Animated gif, JPEG (Requires URL Click-thru)
-Animation – 3 loops maximum
-Alternative Text – May be up to 10 words
-Delivery Schedule – Within 5 business days of flight date

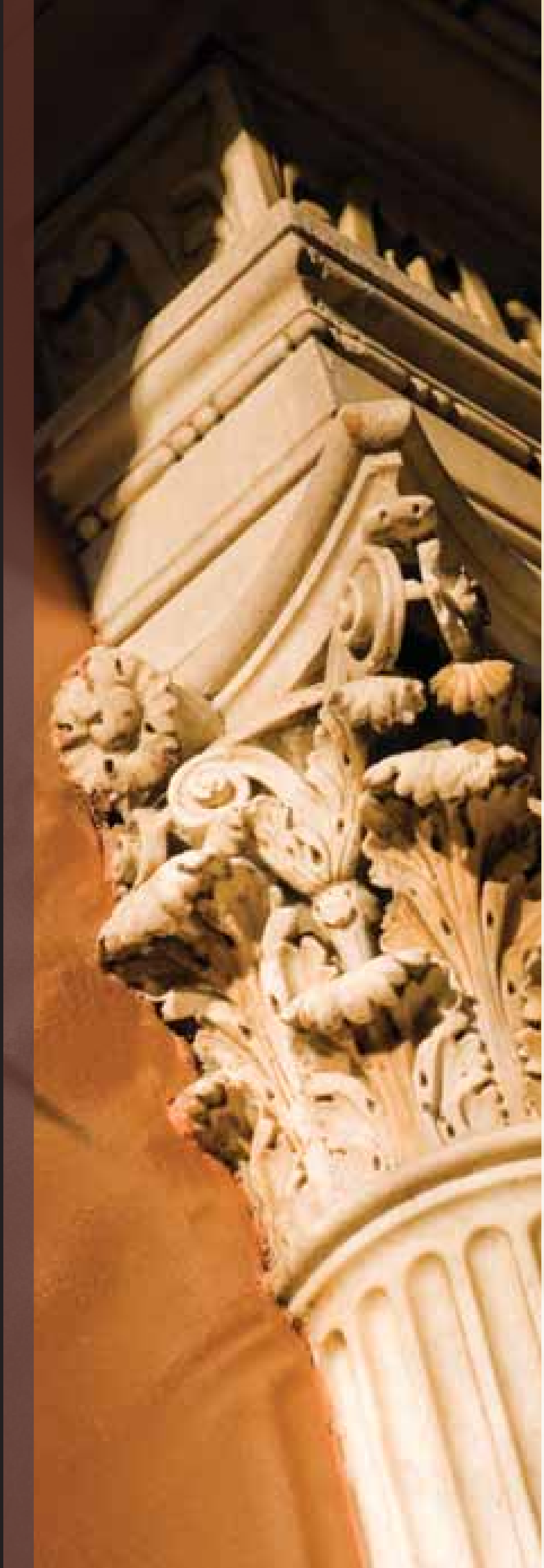
Custom Webinars. *Private Wealth* magazine offers a unique combination of marketing and editorial expertise to produce well-attended and sought-after events with our leading all-star columnists. **Rates: $15,000 to $20,000** net based on customization level

Media partnership webinar program. Partner with *Private Wealth* magazine to give your planned webinar greater exposure to the advisor community and increase awareness and attendance of your event. **Rate: $8,995**

White papers. PW-mag.com will feature branded white papers from industry sponsors and thought leaders to our subscribers through a monthly digital white paper alert blast and a posting within the white paper section on pw-mag.com for one month.

Rate: 1 month/$595, 3 months/$545 per month, 6 months/$445 per month and 12 months/$295 per month

Specs: Logo (120x60) and click-through URL, a white paper intro paragraph (at a maximum of 500 characters with spaces), a Word document or PDF of the white paper, and a white paper title (at a maximum of 70 characters with spaces).



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