

Who We Are

Since 1993, PLANSPONSOR has been the nation's leading authority on retirement and benefits programs and has been dedicated to helping employers navigate the complex world of retirement plan design and strategy.

We reach the retirement plan decisionmakers that matter most in all corners of the market. With all the changes in the retirement industry, plan sponsors and advisers rely on PLANSPONSOR magazine to help them stay informed on crucial issues and important new innovative solutions. Reaching an influential audience across print, digital, online and multimedia platforms, PLANSPONSOR offers industry providers a powerful array of customer-driven marketing programs and information resources to strengthen their brand.

Editorial Illustration Spectrum Award

Two Time Gold Winner
Silver Winner

Communication Arts

2005 – 2014

American Illustration

2001 – 2014



What We Do



Magazine: With its reputation for editorial integrity, objectivity and leadership, PLANSPONSOR is the trusted information and solutions resource for America's retirement benefits decisionmakers. Feature your firm and establish your position as an industry leader by contributing to the content of the print and digital publications.



Digital: At PLANSPONSOR.com and via our daily NewsDash newsletter, we deliver news and insight into the issues and changes that shape the retirement industry. Increase your brand awareness with exposure to our average monthly audience of 250,000.



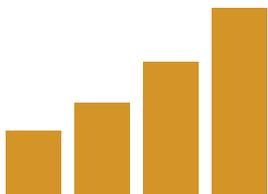
Events: With our PLANSPONSOR National Conference, we've established an annual meeting—the largest gathering in the industry for plan sponsors, plan advisers and their peers. Reach out to and interact with this key audience, while attending informative sessions that give you the insight and information needed to grow your business.



eNewsletters: At PLANSPONSOR.com and via our daily NewsDash newsletter, we deliver news and insight into the issues and changes that shape the retirement industry. Take advantage of targeted promotion and public relations, increase your brand awareness and advertise via our highest-traffic issues with custom digital promotion packages.



Webcasts/Multimedia: Through webcasts and video, we facilitate discussions of the latest trends, strategies and potential problems that plan sponsors need to understand. Increase the impact of your firm's message, and position your executives as leading voices through our multimedia channels: webcast, sponsored video and mobile platforms.



Research: Our position as a comprehensive information solution and the caliber of our audience enable us to conduct multiple surveys, industry studies and research-driven projects to assess what issues drive the retirement industry and are relevant to plan sponsors. Partnering with PLANSPONSOR on a custom research project positions your brand in front of a unique group of influential subscribers and defines your organization as an industry leader.



Features and Departments

The magazine is organized to best meet the information requirements of its highly diverse audience of retirement plan decisionmakers. PLANSPONSOR's standard sections and departments include:

INSIGHTS*

Global Editor-in-Chief Alison Cooke Mintzer on important issues of the day.

ISSUE INTRO*

Gives a glimpse of the issue's most intriguing content—and shares what is on our readers' radar.

WHAT'S ONLINE*

Highlights from PLANSPONSOR's website, with excerpts from features and online discussions.

SURVEY SAYS*

PLANSPONSOR's online readership comments on compelling topics.

INDUSTRY ANALYSIS (3x per year)

Spotlighting industry data from PLANSPONSOR's proprietary research.

QDIA ANALYSIS (4x per year)

Analysis of the three qualified default investment alternatives.

TDF ANALYSIS (4x per year)

Strategic Insight's quarterly target-date fund analysis.

WASHINGTON UPDATE*

Summaries of the latest rules and regulations from Washington and the courts— what's coming, what's contemplated, and what's critical for plan sponsors to know.

UPFRONT*

Succinct and insightful coverage of the latest industry news and trends.

Q&A

PLANSPONSOR editors get "up close and personal" with thought leaders about retirement savings reform.

ASSET CLASS FOCUS (5x per year)

An in-depth analysis and debate about investment sectors in a plan sponsor's line-up—and why and when to use them, or not.

DB FOCUS (6x per year)

Investment sectors are analyzed for defined contribution plan sponsors.

THE BOTTOM LINE

A "C-suite" focus on the applications and approaches that can impact financial reporting and cash flow.

403(b) Q&A (3x per year)

Readers' questions about 403(b) plans and regulations, answered by industry experts.

DB PLAN Q&A (4x per year)

Readers' questions about defined benefit plan design, investments and administration, answered by industry experts.

DC PLAN Q&A (4x per year)

Readers' questions about defined contribution plan design, investments and administration answered by industry experts.

PLAN CORRECTIONS (6x per year)

How to avoid common plan mistakes—and how to correct them if you've made them.

PLAN SPONSOR COACH (5x per year)

The fundamentals of what every plan sponsor needs to know to be effective.

RULES & REGS

Homing in on a particular rule or regulation essential to running a plan.

RUNNING THE FUND

Practical insights on the latest trends and options in investment fund management.

TOTAL BENEFITS

Innovations and strategies in the design and implementation of retirement and health care benefits programs.

JUST OUT OF REISH*

ERISA experts Fred Reish, Bruce Ashton and Josh Waldveser of Drinker Biddle & Reath offer timely insights and perspectives on legal and fiduciary concerns.

SAXON ANGLE (5x per year)

Groom Law Group's Steve Saxon offers a Washington insider's view on the legislative and regulatory changes affecting plan sponsors.

DONE DEAL*

Case studies that reveal the decisionmaking process of a plan sponsor; these cite a problem and its solution in a replicable manner.

*Runs in every issue.

2016 Editorial Calendar*

JANUARY	FEBRUARY	MARCH	APRIL
<p>HIGHLIGHTS</p> <ul style="list-style-type: none"> • Creating an Effective Plan • Financial Wellness • Brokerage Windows <p>FEATURED DEPARTMENTS</p> <ul style="list-style-type: none"> • DB Plan Focus: Cash Balance Plans • Plan Corrections • Q&A: 403(b) Plans • PLANSPONSOR Analysis <p>SURVEY/BUYER'S GUIDE 2015 Defined Contribution Survey: Industry Trends</p> <p><i>Sponsored reservation: 11/15/15</i> <i>Run of book reservation: 12/23/15</i> <i>Ad material: 12/30/15</i> <i>Mail date: 1/21/16^</i></p>	<p>HIGHLIGHTS</p> <ul style="list-style-type: none"> • The Value of a Financial Adviser • Participant Advice • Mobile Technology <p>FEATURED DEPARTMENTS</p> <ul style="list-style-type: none"> • Asset Class Focus: White Label Funds • PS Coach • Q&A: DB Plans • TDF Analysis <p>SURVEY/BUYER'S GUIDE Adviser/Consultant Listings</p> <p><i>Sponsored reservation: 12/15/15</i> <i>ROB reservation: 1/13/16</i> <i>Material: 1/20/16</i> <i>Mail date: 2/23/16^</i></p>	<p>HIGHLIGHTS</p> <ul style="list-style-type: none"> • Retirement Plan Sponsor of the Year • Fiduciary Outsourcing • Plan Governance <p>FEATURED DEPARTMENTS</p> <ul style="list-style-type: none"> • DB Plan Focus: DC Conversion • Stand Corrected • Total Benefits/Health Care Plans • Q&A: DC Plans • QDIA Analysis <p>SURVEY/BUYER'S GUIDE Health Savings Account Guide</p> <p><i>Sponsored reservation: 1/22/16</i> <i>ROB reservation: 2/17/16</i> <i>Material: 2/24/16</i> <i>Mail date: 3/24/16^</i> <i>Bonus distribution: PLANSPONSOR/PLANADVISER Awards Dinner</i></p>	<p>PLANSPONSOR's Annual Anniversary Issue: Plan Optimization</p> <p>HIGHLIGHTS</p> <ul style="list-style-type: none"> • Brokerage Windows • Custom Target-Date Funds • Gap Analysis • Managed Accounts • Participant Account Statements • Stable Value Funds • Targeted Participant Education • Total Benefits <p>SURVEY/BUYER'S GUIDE Participant Survey</p> <p><i>Sponsored reservation: 2/26/16</i> <i>ROB reservation: 3/21/16</i> <i>Material: 3/28/16; Mail date: 4/26/16^</i> <i>Bonus distribution: PLANSPONSOR National Conference</i></p>
MAY	JUNE	JULY	AUGUST
<p>HIGHLIGHTS</p> <ul style="list-style-type: none"> • Best Plan Practices Today • PLANSPONSOR Services Stars • Educating Plan Committees <p>FEATURED DEPARTMENTS</p> <ul style="list-style-type: none"> • DB Plan Focus: ESG • Plan Corrections • Q&A: DB Plans • TDF Analysis <p>SURVEY/BUYER'S GUIDE Best in Class 401(k) Plans</p> <p><i>Sponsored reservation: 3/14/16</i> <i>ROB reservation: 4/11/16</i> <i>Material: 4/18/16</i> <i>Mail date: 5/19/16^</i> <i>Bonus distribution: PLANSPONSOR National Conference</i></p>	<p>HIGHLIGHTS</p> <ul style="list-style-type: none"> • The Cost of Accounts Left Behind • Evaluating Fund Options/Fees • Retirement Readiness/Gap Analysis <p>FEATURED DEPARTMENTS</p> <ul style="list-style-type: none"> • Asset Class Focus: Passive vs. Active Equity Funds • PS Coach • Total Benefits/Health Care • Q&A: DC Plans • QDIA Analysis <p>SURVEY/BUYER'S GUIDE Recordkeeping Survey</p> <p><i>Sponsored reservation: 4/25/16</i> <i>ROB reservation: 5/13/16</i> <i>Material: 5/20/16</i> <i>Mail date: 6/21/16^</i></p>	<p>HIGHLIGHTS</p> <ul style="list-style-type: none"> • The Value of Outsourcing • Plan Re-enrollments • Plan Leakage <p>FEATURED DEPARTMENTS</p> <ul style="list-style-type: none"> • DB Plan Focus: LDI • Stand Corrected • Q&A: 403(b) Plans • PLANSPONSOR Analysis <p>SURVEY/BUYER'S GUIDE TPA Buyer's Guide</p> <p><i>Sponsored reservation: 5/25/16</i> <i>ROB reservation: 6/15/16</i> <i>Material: 6/22/16</i> <i>Mail date: 7/21/16^</i></p>	<p>HIGHLIGHTS</p> <ul style="list-style-type: none"> • Executive Compensation Plans • Retirement Income • Target-Date Funds • 10 Years of the Pension Protection Act <p>FEATURED DEPARTMENTS</p> <ul style="list-style-type: none"> • Asset Class Focus: Custom vs. Off the Shelf • PS Coach • Q&A: DB Plans • TDF Analysis <p>SURVEY/BUYER'S GUIDE Stock Plan Buyer's Guide</p> <p><i>Sponsored reservation: 6/15/16</i> <i>ROB reservation: 7/14/16</i> <i>Material: 7/21/16; Mail date: 8/23/16^</i> <i>Bonus distribution: PLANADVISER National Conference</i></p>
SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
<p>HIGHLIGHTS</p> <ul style="list-style-type: none"> • Hiring an ERISA Attorney • PSNC Recap • Managed Accounts <p>FEATURED DEPARTMENTS</p> <ul style="list-style-type: none"> • DB Plan Focus: Alternative Assets • Stand Corrected • Total Benefits/Health Care • Q&A: DC Plans • QDIA Analysis <p>SURVEY/BUYER'S GUIDE ERISA Attorney Guide</p> <p><i>Sponsored reservation: 7/15/16</i> <i>ROB reservation: 8/12/16</i> <i>Material: 8/19/16</i> <i>Mail date: 9/22/16^</i></p> <p>AD STUDY</p>	<p>HIGHLIGHTS</p> <ul style="list-style-type: none"> • New Technology/Data Analytics • 403(b)/457 Plans • Holistic Benefits Planning <p>FEATURED DEPARTMENTS</p> <ul style="list-style-type: none"> • Asset Class Focus: Multi-Asset Funds • PS Coach • Q&A: 403(b) Plans • PLANSPONSOR Analysis <p><i>Sponsored reservation: 8/25/16</i> <i>ROB reservation: 9/16/16</i> <i>Material: 9/23/16</i> <i>Mail date: 10/25/16^</i></p>	<p>HIGHLIGHTS</p> <ul style="list-style-type: none"> • RFP/RFI Outcomes • Retirement Withdrawal Strategies • Plan Fees and Expenses <p>FEATURED DEPARTMENTS</p> <ul style="list-style-type: none"> • DB Plan Focus: Risk Transfer • Stand Corrected • Q&A: DB Plans • TDF Focus <p>SURVEY/BUYER'S GUIDE 2016 Defined Contribution Survey: Providers</p> <p><i>Sponsored reservation: 9/19/16</i> <i>ROB reservation: 10/14/16</i> <i>Material: 10/21/16</i> <i>Mail date: 11/22/16^</i></p>	<p>HIGHLIGHTS</p> <ul style="list-style-type: none"> • 2017 Year in Preview • 2017 Compliance Calendar • 2016 Year in Review <p>FEATURED DEPARTMENTS</p> <ul style="list-style-type: none"> • Asset Class Focus: White Label Funds • PS Coach • Total Benefits/Health Care • Q&A: DC Plans • QDIA Analysis <p>SURVEY/BUYER'S GUIDE Year in Review</p> <p><i>Sponsored reservation: 10/15/16</i> <i>ROB reservation: 11/8/16</i> <i>Material: 11/15/16</i> <i>Mail date: 12/20/16^</i></p>

*This calendar is subject to change. ^Mail dates are subject to change.

Audience Profile

Magazine

Circulation ¹	
Subscribers	35,000
Pass-along readers	24,500
Total readers	59,500

Plan Demographics ²	
Pension fund assets over \$50MM	42%
Pension fund assets over \$250MM	27%

By Plan Type ²	
401(k)	64%
Defined Benefit	29%
457	12%
403(b)	14%
Other	7%

Decisionmaking Power ³	
Employee Benefits/Human Resources	77%
Plan Design	52%
Pension Management	43%
Investment Management	29%
Financial Administration	32%
Portfolio Analysis	21%
Overall Firm Management	19%
Financial Risk Management	15%

PLANSPONSOR.com

Plan Demographics ²	
Pension fund assets over \$25MM	48%
Pension fund assets over \$250MM	30%
Readers at companies w/ 500+ employees	59%

Viewership Habits	
Visit the site once a week or more	37%
Visit by clicking "more" from NewsDash	91%

By Plan Type	
401(k)	18.1%
403(b)	12.5%
457	4.2%
Defined benefit	9.7%
Cash balance/hybrid	9.7%
Nonqualified plan	45.8%
529 or other college savings	7.3%
Other	13.3%

Decisionmaking Power	
Recordkeeper selection and monitoring	65.1%
Investment option selection / monitoring	53.1%
Plan participation	56.4%
Risk management	31.0%
Benefit administration	65.7%
Plan governance	44.0%
Consultant selection	45.8%
Retirement income solutions	32.1%
Portfolio analysis	34.1%

Organization Type	
Corporate/non-financial	27.5%
Professional service	14.4%
Financial institution	25.1%
Consultant	9.8%
Government/education	6.1%
Nonprofit	8.7%
Union	0.7%
Hospital/healthcare	4.1%
Other	3.7%

Size of Total Retirement Plan Assets	
Less than \$10MM USD	22.5%
\$10MM-\$50MM USD	14.3%
\$50MM-\$250MM USD	17.5%
\$250MM-\$500MM USD	7.4%
\$500MM-\$1B USD	9.3%
>\$1B USD	19.8%
Not applicable	9.2%

Number of Employees	
Less than 100	31.8%
101-1,000	25.4%
1,001-5,000	17.8%
>5,000	24.9%

Role in Company	
Executive Management	7.0%
Financial Management	11.4%
Employee Benefits/HR	36.2%
Investments (CIO, Investment Officer, etc.)	2.4%
Attorney/Counsel	2.0%
Operations/Other Management	9.4%
Non-Management	4.4%
Consultant/Adviser	19.9%
Other	7.2%

NewsDash eNewsletter

Circulation	
Subscribers	55,000

Plan Demographics ²	
Pension fund assets over \$25MM	48%
Pension fund assets over \$250MM	30%
Readers at companies w/ 500+ employees	59%

By Plan Type	
401(k)	89.8%
Defined Benefit	34.7%
Nonqualified Plan	27.1%
457	14.4%
403(b)	11.0%

By Organization Type	
Corporate/Non Financial	32.0%
Professional Service	22.1%
Other	15.6%
Financial Institution	14.8%
Consultant	11.5%
Government/Education	7.4%
Nonprofit/Union	4.9%
Hospital/Healthcare	0.8%

Average reader has more than 15 years of experience in plan or fund administration.

50% of readers have purchase involvement for 401(k), Employee Benefits and Healthcare Plan.

¹ 2014 Readership Study (Litchfield Research)

² September 2015 PLANSPONSOR Data.

³ 2014 AdQ Study.

Magazine Print Advertising *Specifications*

Magazine Advertising Rates*

4-Color Process	1x	3x	6x	9x	12x
Full Page	\$20,998	\$19,765	\$18,529	\$16,058	\$14,205
Spread	\$40,146	\$37,674	\$35,205	\$32,733	\$29,193
Premium Positions					
2nd Cover	\$25,940	\$24,088	\$21,617	\$19,146	\$17,293
3rd Cover	\$24,088	\$22,852	\$20,998	\$18,529	\$16,058
4th Cover	\$25,940	\$24,196	\$21,617	\$19,146	\$17,293
Specialty Covers					
Tip-On/False Cover (Two Pages)					\$63,433
Gatefold (Four Pages)					\$74,966
Bound					\$86,500

*Gross Rates

2016 Magazine Closing Dates

Issue	Reservations	Materials
January	12/9/15	12/16/15
February	1/14/16	1/21/16
March	2/17/16	2/24/16
April	3/21/16	3/28/16
May	4/11/16	4/18/16
June	5/13/16	5/20/16
July	6/15/16	6/22/16
August	7/14/16	7/21/16
September	8/12/16	8/19/16
October	9/16/16	9/23/16
November	10/14/16	10/21/16
December	11/8/16	11/15/16

Advertising Units

Unit	Vertical	Horizontal
2-pg spread, live area	-	15.5" x 9.875"
2-pg spread, bleed size	-	16.75" x 11.125"
Full pg, trim size	8.25" x 10.875"	-
Full pg, bleed size	8.5" x 11.125"	-

Materials

Asset International Inc. Attn: Lynn Connelly, 1055 Washington Blvd., Stamford, CT 06901, (203) 595-3262 / creative@assetinternational.com

Production Detail

Tone Density

- 2-color: The sum percentage of tone values should not exceed 170% and only one color may be solid.
- 4-color: The sum percentage of the tone values should not exceed 300% and no more than one color may be solid.

Digital PDF-X 1A Format Specifications

- If you are creating pdf files for magazine ads in InDesign, Illustrator, or QuarkXpress 7, you can export pdf files directly from the application. (You should use a "PDF/X" or "High-Quality Press" factory preset.)
- We recommend that users of older versions of Quark create PDF files by writing Postscript files and distill them using Adobe Acrobat Distiller 7.0 or later.
- To guarantee that your PDFs are compliant with the PDF/X-1a, we recommend running a preflight check on your page-layout files, and a preflight on your final PDF file in Acrobat Professional using a PDF/X-1a profile. Supplied proofs must be printed from the final PDF file (not from page-layout file).

Native files are not acceptable.

Check List

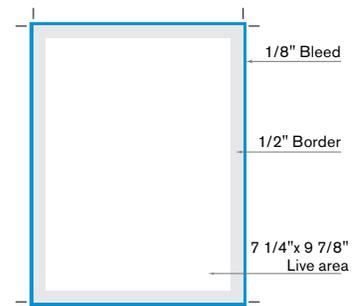
- Correct page size
- 1/8" bleed
- All fonts are active (pay special attention to fonts used in EPS files)
- Both screen and printer fonts are available
- Fonts are not menu-styled
- All images are linked and updated
- Photo effective resolution for black & white line-art images should be more than 1200 dpi
- Images are either Grayscale or CMYK
- Resolution for gray scale and CMYK images should be at least 300 dpi
- Scans and illustrations are either TIFF or EPS
- Created color is CMYK (make sure "spot color" is not checked)
- Send hard copy SWOP proof with color bars and registration marks

Follow SWOP Standards and Specifications for advertising reproduction material and magazine Web offset printing unless otherwise specified. Ads that exceed specified size in any dimension are considered bleed or oversized, except spreads that bleed in the gutter. PDF-X1a files are the only acceptable material format. **Hard copy SWOP proof with color bars and registration marks is recommended to ensure that materials run properly.**

Standard Unit Size

- Trim size: 8 1/4" x 10 7/8"
- Allow 1/8" on all sides for bleeds

Print Method: Web offset lithography
 Cover Stock: 100 lb. Matte
 Text Stock: 45 lb. Matte
 Binding: Saddle Stitched



- Live area: No bleed size
- Border: Any text/image in this area is liable to be cut due to printer cutting variation.
- Bleed: Area to be cropped

Thought Leadership – Native Opportunity

PLANSPONSOR magazine offers clients an industry-recognized platform on which to increase their brand recognition and develop their organization’s position as an industry thought leader. Through a diverse offering of customer-driven marketing and thought leadership programs, PLANSPONSOR works to position your firm in front of a target audience—creating a forum where high-impact editorial content and custom and supplied-content sponsorships work to define nascent trends and deliver key insight and analysis on the retirement benefit space. PLANSPONSOR offers topic-exclusivity per issue, as well as turnkey expertise—from design to editing to production—in all types of collateral, including custom editorial projects, booklets and inserts.

Thought Leadership (Conducted Interview)

Using a moderated-discussion format between a senior PLANSPONSOR editor and key executives at the sponsoring provider firm, these articles center around a topic of compelling interest to the plan sponsor community and elaborate on the characteristics that distinguish the sponsoring firm from its competitors. This article will be designed by Asset International with final approval by the client.

Supplied Thought Leadership (Non-Printer Ready or Printer Ready)

The client provides PLANSPONSOR with approved content for their thought leadership article. Supplied content that is not printer ready is designed by Asset International with final approval from the client. Supplied printer ready content is sent to Asset International as a printer ready PDF.

In order to post supplied thought leadership to PLANSPONSOR.com, the client must provide the native application file for the article, including: all text content, images, charts, and logos used in the article.

Inserts/Customized Marketing

Inserts and customized marketing booklet opportunities feature a sponsored, stand-alone informational insert or booklet glued into PLANSPONSOR magazine. These are designed to be removed easily and retained by readers—providing a high-impact means to build awareness of a product set or define an industry-leading standpoint. Six weeks of lead time are required for the production of inserts and booklets.

Advertorial Guidelines

All advertorials and advertisements must be clearly and immediately recognizable as advertisements. The company name/logo must appear prominently and the words “SPONSORED SECTION” or “SPECIAL ADVERTISING SECTION” for supplied content must appear on each page.

Sponsored Edit Print Rates

THOUGHT LEADERSHIP (conducted interview)	Net Rates
1 page profile	\$18,870
2 page Q&A	\$32,130
Additional pages	\$10,200 per page

SUPPLIED THOUGHT LEADERSHIP (Non-Printer Ready)	Net Rates
1 page	\$17,850
2 page	\$30,090
Additional pages	\$9,180 per page

SUPPLIED THOUGHT LEADERSHIP (Printer Ready)	Net Rates
1 page	\$16,830
2 page	\$28,050
Additional page(s)	\$8,160 per page

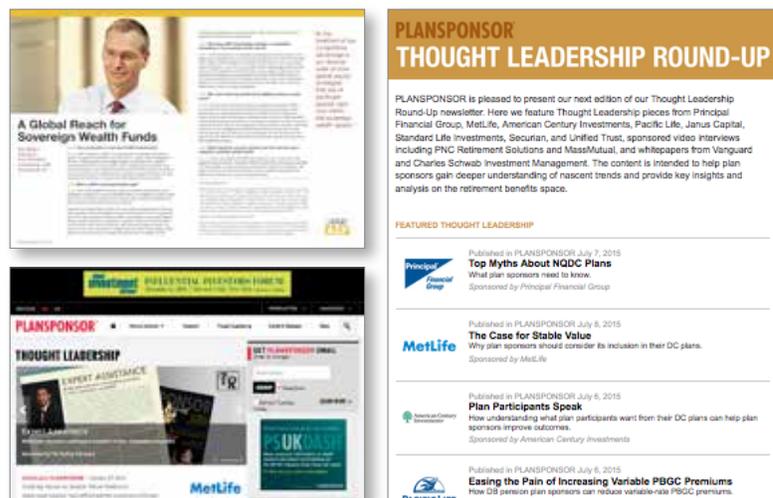
DIGITAL

Plansponsor.com and Thought Leadership Round-Up newsletter	\$4,000
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ELECTRONIC REPRINTS—PDF

Up to 4 pages	\$3,750
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INSERTS/CUSTOMIZED MARKETING	on request
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Sponsored Thought Leadership and supplied advertorial pieces are posted on the PLANSPONSOR.com Thought Leadership landing page for 60 days and featured in our monthly Thought Leadership Roundup newsletter.

Digital Advertising



PLANSPONSOR.com

PLANSPONSOR.com offers visitors an inside look at the leaders in the retirement space and presents industry-leading ideas on an easy-to-access platform. Delivering current news, trend analysis, and retirement industry information to audience members, PLANSPONSOR.com supplements the strong content and focus of the magazine with interactive research, thought leadership, and multimedia libraries. Many sponsorship and promotional opportunities are available, from shared or exclusive sponsorships to premium and run-of-site advertising placements.

Monthly Averages

Unique Visitors: 57,000
 Page Views: 250,000
 Time Spent on Site: 6 minutes

Run of Site Banner Ads

- Top Super Leaderboard (970x90 px): *\$135 CPM*
- Top Leaderboard (728x90 px): *\$125 CPM*
- Top Large Rectangle (300x600 px): *\$135 CPM*
- Top Island (300x250 px): *\$125 CPM*
- Mid Leaderboards (728x90 px): *\$90 CPM*
- Mid Islands (300x250 px): *\$90 CPM*
- Sponsored Text Link: *\$1,500 per month*
- Expandable Top Leaderboard w/Video: *\$150 CPM*
- Expandable Top Island w/Video: *\$150 CPM*

Exclusive Daily Sponsorships

- Top Page Pushdown (1040x60 to 1040x400 px) *\$2,000*
- Homepage Roadblock (all ROS positions) *\$1,750*
- Welcome Banner (600x400 px) *\$1,750*
- Homepage Wallpaper *\$1,750*

eNewsletter Advertising

PLANSPONSOR NewsDash eNewsletter

Circulation base: 55,000 total readers

PLANSPONSOR's NewsDash is a daily email newsletter that reaches the leaders of the retirement benefit community. NewsDash delivers updates on news and information that is crucial for the success of plan sponsors and advisers. Clients may choose from nonexclusive advertising sizes displayed in the daily NewsDash newsletter or from custom sponsorship opportunities that work to elevate brand awareness and establish expertise by directly connecting with a key target audience.

PLANSPONSOR (b)lines eNewsletter

Circulation base: 6,500 total readers

PLANSPONSOR's email newsletter (b)lines is designed to help more than 6,000 advisers and individuals with responsibility for managing their organizations' 403(b) plans stay on top of the fast-moving changes and developments in this evolving market. Published on Tuesdays and Fridays, (b)lines is the perfect vehicle that providers committed to this market can use to advertise and promote their capabilities.

PLANSPONSOR Weekend

Circulation base: 50,000 total readers

A weekly newsletter recapping the top stories featured on PLANSPONSOR.com. PLANSPONSOR Weekend pairs our advertisers with our most popular and attention grabbing content.

NewsDash Banner Ads

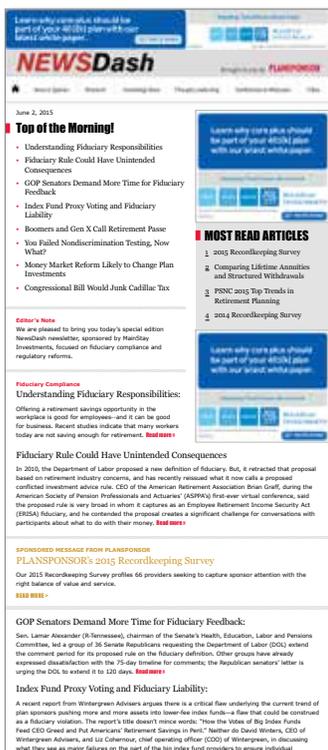
- Top Leaderboard (728x90 px): \$1,750 each newsletter
- Top Island (300x250 px): \$1,750 each newsletter
- Mid Leaderboard (728x90 px): \$1,500 each newsletter
- Mid Island (300x250 px): \$1,500 each newsletter
- Sponsored Message
 - Header—one line; up to 70 characters including spaces
 - Body—3 lines; up to 85 characters per line including spaces
 - URL—please send as http:// format, not www.
- Roadblock of ads in one edition of NewsDash \$6,000 each newsletter

(b) Lines Banner Ads

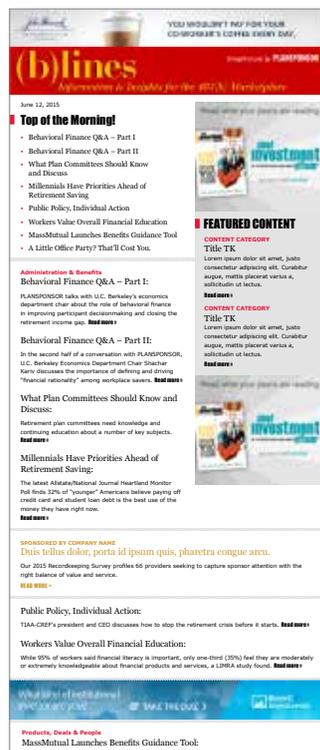
- Top Leaderboard (728x90 px): \$900 each newsletter
- Top Island (300x250 px): \$900 each newsletter
- Mid Leaderboard (728x90 px): \$800 each newsletter
- Mid Island (300x250 px): \$800 each newsletter
- Sponsored Message:
 - Header—one line; up to 70 characters including spaces
 - Body—3 lines; up to 85 characters per line including spaces
 - URL—please send as http:// format, not www.
- \$800 each newsletter

Week In Review Ads

- Top Leaderboard (728x90 px): \$1,750 each newsletter
- Large Rectangle (300x600 px): \$1,750 each newsletter



NewsDash



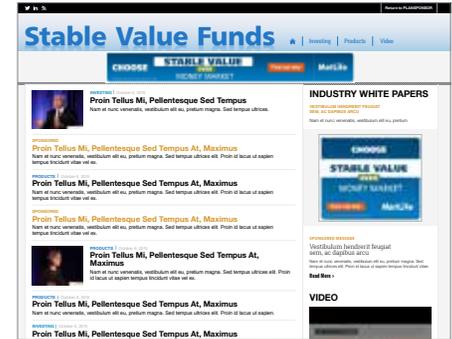
(b)Lines

Digital Advertising Custom Programs

Microsite

Opportunity to partner with PLANSPONSOR to create a branded section online around a specific topic relevant to the PLANSPONSOR audience. As the sponsor, your thought leadership material (whitepapers, videos, research) is posted in this section, along with content from PLANSPONSOR. Sponsors also get the opportunity to post an article(s), similar to the Industry Voices program, in the microsite. The microsite is featured on the PLANSPONSOR homepage, and promoted regularly during the sponsorship via sponsored messages and banner ads in PLANSPONSOR daily, PLANSPONSOR week in review, and thought leadership round-up newsletters.

Investment: \$20,000 per month



Microsite

Industry Voices Program

Industry Voices, provides the opportunity for our clients to position their high-impact supplied content in front of a target audience that is interested in learning about new trends and key insights surrounding the retirement benefits space.

Program Features:

One contributed article (word count 500-700 words) posted online after being vetted/edited by our editor; editorial has final say on title/description of article

- Article would appear on the PLANSPONSOR homepage in the "More News" section
- Article would be tagged "Industry Voices" and would also say "Contributed Content" by "provider's name"
- Article would remain in the "More News" section and would gradually get pushed down the page as more editorial content is added
- Article would then reside in the "Industry Voices" topic section for 6 months
- Article would run in one edition of NewsDash newsletter OR (b)lines newsletter (if content is 403(b) relevant)
- Article would run in one edition of Thought Leadership Round Up newsletter
- PLANSPONSOR will post no more than two "Industry Voices" articles per month
- Contributing provider receives topic exclusivity for 30 days after "Industry Voices" article appears

Investment: \$15,000



Industry Voices



Custom Newsletter

Custom Newsletters

PLANSPONSOR offers two ways for clients to be featured in custom newsletters. With the sponsor contributed content custom newsletter, each client has the opportunity to control up to half of the newsletter's editorial content-about four to six links-in addition to all advertising placements. This content is paired with original content from the PLANSPONSOR editorial team and additional links to previously written relevant stories. Clients can also choose to sponsor the topic of the newsletter and all advertisement placements. PLANSPONSOR's editorial team will provide all of the content for this newsletter Custom newsletters allow your firm to expand its presence, establish its expertise in a specific topic area, and directly connect with a key target audience.

Custom Newsletter Ads

- Top Leaderboard (728x90 px)
- Top Island (300x250 px)
- Mid Leaderboard (728x90 px)
- Mid Island (300x250 px)

Sponsor Contributed Content: \$15,000 net

Topic Sponsorship: \$7,500 net

Digital Advertising Custom Programs

Featured Whitepaper Program

Leverage the power of PLANSPONSOR's audience and use it as a platform to introduce and promote your firm's whitepapers. Allowing our website to host and publicize your whitepaper delivers it to a wider audience, enhances its impact, and strengthens your brand.

Details:

- Hosted on PLANSPONSOR.com for two months
- Contact information of all readers captured prior to access
- Abstract rotates on "Industry Whitepaper" box on homepage
- Promoted and featured in two editions of Thought Leadership Round-Up Newsletter
- Promoted in two Newsletter Sponsored Messages
 - Header—one line; up to 70 characters including spaces
 - Body—3 lines; up to 85 characters per line including spaces
 - URL—please send as http:// format, not www.

\$5,000/Whitepaper



Exclusive Mobile Platform Sponsorships

Interact with the PLANSPONSOR audience on the move, with exclusive monthly sponsorships of the PLANSPONSOR mobile app and mobile-optimized website.

Mobile-Optimized Banners

- 300x50px (Android/Windows)
- 320x50px (iOS)
- 20k max file size

\$2,500/Month

Digital Edition Mobile App

- 320x50px (Phones): 20k max file size
- 728x90px (Tablets): 30k max file size
- 960x90px (Tablets): 40k max file size

\$5,000/Month



Digital & eNewsletter Advertising Specifications

Run of Site PLANSPONSOR.com

- Top Super Leaderboard (970x90 px)
- Top Leaderboard (728x90 px)
- Top Large Rectangle (300x600 px)
- Top Island (300x250 px)
- Mid Leaderboard (728x90 px)
- Mid Island (300x250 px)
- Sponsored Text Link
- Expandable Top Leaderboard w/Video
- Expandable Top Island w/Video

EXPANDABLE ROS BANNERS

- 728x90px collapsed; 728x315px expanded
- 300x250px collapsed; 300x600px expanded
- 100k maximum file size
- PSD template will be provided

Welcome Banner *Premium Position*

- 600 x 400 px
- 100k maximum file size

Pushdown *Premium Position*

- 1040x60 px collapsed; 1040x250 px expanded
- 100k maximum file size
- PSD template will be provided

Wallpaper *Premium Position*

- Total size: 1400x800 px
- 200k maximum file size
- PSD template will be provided

FILE SIZE AND ANIMATION SPECIFICATIONS

DISPLAY/ROS

- 75k maximum file limit
- GIF/JPEG, HTML, DHTML, Javascript, HTML5; accepted upon testing
- 3rd party tags accepted; please include: image/link tracking documentation for macro implementation
- Three loop limit—animation must cease after fifteen seconds
- Flash V9 and below; Action Script accepted: AS1 and AS2; The following code MUST be the first layer on every scene of the movie: On (release) {getUrl (clickTag, “_blank”);}
- HTML - No tags; without JavaScript preferred

PREMIUM POSITION PLACEMENTS; PLEASE SUPPLY THE FOLLOWING:

- .fla – FLASH movie file
- .swf – compressed version of .fla
- .gif – alternate GIF image to be served to non-capable browsers

Materials due five business days prior.

Email creative to adops@assetinternational.com

Cancellation only accepted two weeks prior to campaign start—i.e., 15th of month prior. Cancellation after deadline will result in penalty fee.

eNewsletters *NewsDash and (b)lines*

- Top Leaderboard (728x90 px)
- Top Island (300x250 px)
- Mid Leaderboard (728x90 px)
- Mid Island (300x250 px)
- Sponsored Message (Header—one line; up to 70 characters including spaces
Body—3 lines; up to 85 characters per line including spaces URL—please send as http:// format, not www.)

FILE SIZE AND ANIMATION SPECIFICATIONS

- 40k maximum file size
- GIF, JPEG and PNG format; 3rd party image tags not accepted
- 1x1 pixels not accepted
- 3rd party click tags accepted
- No looping; no animation.



Run of Site



Welcome Banner



Wallpaper



eNewsletter



Pushdown

Multimedia Opportunities

Increase the impact of your firm's message by working with PLANSPONSOR to produce an exclusive video interview that highlights an executive in your firm and showcases your organization as an industry thought leader, or provide a video your firm has already produced and let PLANSPONSOR host and publicize it for you.

Video Interview Features

The five-minute interview will feature the following types of questions:

- Can you provide an overview of your firm?
- What are some of the key themes you are hearing from plan sponsors today?
- How is your firm helping plan sponsors with their challenges?
- How does your firm differentiate itself in today's marketplace?
- How do you see the retirement landscape evolving over the next few years?

Supplied Video/Video Interview Benefits

- PLANSPONSOR covers all production, hosting, and posting-related expenses
- Cross-promotion on our site and e-newsletters
- Hosted on PLANSPONSOR.com for 90 days (client owns video after 90 days)
- Can be linked and tracked with any outside Web site
- QuickTime/Windows Media File to be provided at no additional fee

PLANSPONSOR.com Promotion

Custom created banner ads will run online and in newsletters during first 30 days.

NewsDash Promotion

Video will be promoted as a sponsored text message (text ad) in three editions of the NewsDash newsletter.

PLANSPONSOR Thought Leadership Round-Up Promotion

Video will be included in two editions of PLANSPONSOR's Thought Leadership Round Up Newsletter.

Videos can be taped at:

PLANSPONSOR National Conference

June 15-17, 2016
Renaissance Hotel, Washington D.C.

PLANADVISER National Conference

September 12-14, 2016
JW Marriott, Grand Lakes, Orlando, Florida

Or at one of the following offices:

- New York: 805 Third Avenue, 21st Floor, New York, NY 10022
- Stamford: 1055 Washington Blvd, 4th Floor, Stamford, CT 06901
- Boston: 255 State Street, Boston, MA 02109

Investment:

Video Interview: \$8,500 net
Supplied Videos: \$7,500 net



Hosted in video tab of PLANSPONSOR.com

2016 Conferences, Seminars, and Awards Programs



Conferences and events are essential to most marketers' strategies for the simple fact that no other medium enables you to strengthen existing customer relationships and develop new business opportunities like face-to-face meetings.

Throughout the year, PLANSponsor's parent company Asset International hosts a series of industry-leading conferences, seminars, and awards dinners to educate and recognize our audience.

Each event offers numerous opportunities to participate as a keynote speaker or panelist; exceptional brand exposure before, during, and after each event; and ample time reserved throughout the program for face-to-face networking. PLANSponsor events provide a perfect venue for your company to make direct connections with the key retirement benefit decisionmakers and influencers you have been trying to meet.

As a sponsor of a **PLANSponsor** event, you receive:

- Cost-effective exposure to America's most influential retirement benefits decisionmakers
- The opportunity to position your firm as a thought leader
- Unmatched insight into key customer priorities
- Exceptional brand recognition
- The chance to demonstrate your commitment to your clients and associates
- Direct association with the PLANSponsor brand
- Excellent lead generation

Reach Your Prospects

While each conference, seminar, or awards dinner differs in terms of the audience it is designed to attract, PLANSponsor strives to deliver a balanced profile for each program so that the number of buyers far outweighs the number of sellers in the room. This emphasis on a proper audience balance allows for optimal networking and exceptional exposure to our valued sponsors.

FOR GENERAL INFORMATION CONTACT

MIKE GARITY, 617-670-4710, mgarity@assetinternational.com

CAROL POPKINS, 203-595-3282, cpopkins@assetinternational.com

TESTIMONIALS

"The topics were timely and the speakers were well-informed. The information provided was useful. The agenda was jam-packed and there wasn't a wasted moment!"

THE WALT DISNEY COMPANY

"This conference is a great way to stay current with what's really important in the retirement plan world. Great way to network and many knowledgeable people available."

LAND O'LAKES, INC.

"It is perhaps the best and largest gathering of qualified plan sponsors and their advisors/providers, and it is an excellent source of current and helpful information for plan sponsors."

ALSTON & BIRD

"This is a great opportunity to interact and get the plan sponsor's perspective on the market, trends and issues that affect our industry as well as sales and retention of plans from an advisor and provider perspective."

DIVERSIFIED

2016 Conferences, Seminars, and Awards Programs Calendar*

MARCH

Global Custodian Europe Awards Dinner *March 17, The Savoy, London*

PLANSPONSOR/PLANADVISER Awards for Excellence Dinner *March 31, Chelsea Piers, New York*

APRIL

Chief Investment Officer Summit New York *April 13-14, Harvard Club, New York*

JUNE

Chief Investment Officer European Influential Investors' Forum *June 2, Rosewood London, London*

Chief Investment Officer European Innovation Awards *June 2, Rosewood London, London*

DC Plan Boot Camp *June 15, Renaissance Hotel, Washington D.C.*

PLANSPONSOR National Conference (PSNC) *June 15-17, Renaissance Hotel, Washington D.C.*

Strategic Insight Fund Trends 2016 *June 21-22, Chelsea Piers, New York*

SEPTEMBER

PLANADVISER National Conference Golf Tournament *September 11, The Ritz-Carlton Golf Club, Grande Lakes, Orlando*

PLANADVISER National Conference (PANC) *September 12-14, JW Marriott, Grande Lakes, Orlando*

529 Conference & 529 'Essentials' Seminar *September 12-14, JW Marriott, Grande Lakes, Orlando*

OCTOBER

Strategic Insight Funds Europe 2016 *London*

Strategic Insight (MFDF) *New York*

NOVEMBER

Global Custodian US Awards Dinner *New York*

The Trade: Leaders in Trading 2016 – Awards and Gala Dinner *London*

Strategic Insight Fund Trends Canada 2016 *Canada*

DECEMBER

Chief Investment Officer Emerging Leaders Forum *December 12, Harvard Club, New York*

Chief Investment Officer Influential Investors Forum *December 12, Harvard Club, New York*

Chief Investment Officer Industry Innovation Awards *December 12, New York Public Library, New York*

**This calendar is subject to change.*

Webcasts

PLANSPONSOR offers three unique ways for providers to get involved.

Overview

PLANSPONSOR develops and hosts sponsored webcasts focused on the most critical business issues facing our much sought-after audience of qualified plan sponsors. Our webcasts provide a great way to quickly identify and engage with the plan sponsors most interested in the topic area you present—positioning your firm as an industry expert through an informative and objective panel discussion. All webcasts are hosted by PLANSPONSOR editors and can be up to 60 minutes in duration.

Choose from one of the following three Webcast formats:

Editors Select™ Webcast Series

Our topic + our moderator + our panelists + your expert

Throughout the year, the editors of PLANSPONSOR will produce a series of highly targeted webcasts focused on the most critical business issues facing our plan sponsor audience. Each webcast will feature insight from the nation's top plan sponsors, retirement plan advisers, key industry experts and a featured thought leader from a sponsoring firm.

A PLANSPONSOR editor will moderate the webcast and collaborate with the exclusive sponsor to identify and recruit the right mix of plan sponsors and experts (3 max) to compliment the panelist from the sponsoring firm. Overall, our Editors Select Webcasts align the editorial credibility of PLANSPONSOR with the thought leadership expertise of our sponsor in order to maximize audience interest.

Choose from one of the following Editors Select™ topics:

- The Future of Plan and Participant Benchmarking
- Trends in Retirement Plan Design
- The Mechanics of Re-Enrollment
- Alternatives in DC Portfolios
- Developing Truly Engaging Participant Meetings
- Optimizing Participant Outcomes
- Beyond Automated Plans - Best Practices in Participant Communication
- Best Practices in Plan Committee Governance
- Selecting and Monitoring a Retirement Plan Adviser or Consultant
- How to Avoid the Most Common Plan Mistakes
- Best Practices in Managing Multiple Plans

Special topics focused on recent survey results

- Understanding Participant Behavior—Insight from PLANSPONSOR's Participant Survey (PA and PS)
- Selecting and Monitoring a Retirement Plan Provider—Insight from PLANSPONSOR's Recordkeeper Survey (PA and PS)

Editors Select™ Custom Webcasts

Your topic + our moderator + our panelists + your expert

Have a topic outside of our Select Series list that you would like PLANSPONSOR to host? Leverage the deep content knowledge and industry contacts of our PLANSPONSOR editorial team to build a webcast that aligns with your content goals while ensuring interest from our readers. Upon approval of your topic, our editorial team will work with your firm to identify the right plan sponsors and industry experts (2 to 3 max) to complement the panelist from your firm.

Sponsor-Driven 'Native' Webcasts

Your topic + our moderator + your panelists + your expert

Native advertising is all the rage in the B2B market these days. Our Native Webcasts give you the flexibility to develop your own content for the webcast and work with our experienced editorial staff to deliver your insight to our plan sponsor community. PLANSPONSOR provides the audience, infrastructure and webcast moderator while allowing you to build and deliver your own thought leadership message with up to three panelists from within and outside your firm.

Pricing

Webcast: \$25,000

Additional Services (see next page for details):

Webcast360 Program: \$5,000

Audience Extensions: \$5,000 (subject to approval/availability)

Webcasts

Additional Services

Webcast360 Program

Webcast360 is a customizable email follow-up tool that directly promotes your brand, expertise and product advantages to all webcast registrants after the event. Our experience has found that post-event follow-up is key to converting your participants from interested listeners to active customers. Our Webcast360 ensures the communication loop is closed and your underlying sales proposition is understood.

Benefits include:

- Webcast360 enables the sponsor/client to highlight specific areas of expertise relevant to the webcast content and to introduce other company programs.
- Webcast360 leverages the brand and relationships that PLANSPONSOR already has established with our readership, making it much more effective than emails sent directly by the sponsor/client.
- Each Webcast360 email is tracked, and results are delivered to your sales team—providing critical insight into the most qualified leads for closing new business.

Audience Extensions

Expand your reach to the retirement plan adviser community by including a second promotional campaign to the audience of our sister publication, PLANADVISER. Your webcast will be promoted through email, newsletters and website channels with the same consistency as your campaign via PLANSPONSOR.

A Full-Service Experience

PLANSPONSOR is a full-service webcast provider. All webcasts include the following:

- Editorial guidance throughout the content development process and webcast moderation on the day of the event
- Extensive pre-webcast marketing campaign (through direct email to PLANSPONSOR subscribers, promotion within our NewsDash eNewsletter and on the plansponsor.com website)
- Opportunity to extend your reach to our the PLANADVISER audience
- Attendee registration management
- Attendee approval/denial options for our sponsors
- Technical management of the event (via the WebEx platform)
- Post-event wrap-up (including the delivery of registrant and participant lists, audience Q-and-A results, session archiving)
- Closed loop, post-event communication opportunities through our Webcast360 campaign



Timeline/Deadline Requirements:

As the exclusive sponsor of a PLANSPONSOR webcast, the following webcast development process is mandatory to ensure a successful event:

- Five weeks prior to the webcast: Organizers from the sponsoring company will participate in a kick-off call with a PLANSPONSOR editor and webcast strategy team to finalize the webcast's theme and the overall plan for the 60-minute session.
- Four weeks prior to the webcast: The webcast title and description used for marketing purposes will be finalized and delivered to our marketing manager.
- One week prior to the webcast: All panelists must attend a 'dress rehearsal' pre-call to review both the content flow and technical aspects of the webcast. Prior to the pre-call, a draft of the webcast presentation must be submitted for review by the PLANSPONSOR editor.

Additional Requirements:

- To associate your brand with your webcast, a PLANSPONSOR editor will moderate the webcast providing (at minimum) welcome remarks, speaker introductions and Q-and-A facilitation.
- A maximum of three panelists may participate in the webcast.
- A maximum of three custom questions may be added to the registration page to enhance the value of all leads captured.

Postpone/Cancellation Policy:

In the event of a postponement requested 30 to 60 days prior to the webcast, liquidated damages in the amount of 25% of the contracted rate will be added to the final invoice and we will work with you to identify a new date to host the webcast. In the event of cancellation occurring 30 to 60 days prior to the webcast, liquidated damages in the amount of 50% of the contracted rate will be due. In the event of postponement or cancellation occurring less than 30 days prior to the webcast, liquidated damages in the amount of 100% of the contracted rate will be due. Additionally, the webcast must be scheduled/produced/delivered in the 2016 calendar year or liquidated damages in the amount of 100% of the contracted rate will be due.

Co-Sponsored Research

Teaming with PLANSPONSOR to create co-sponsored research is a way to demonstrate thought leadership and expertise in a specific area of the market.

PLANSPONSOR will help you create a unique questionnaire and will identify a target audience for a timely and topical research study. A portion of the study results will appear in PLANSPONSOR (print and electronic versions), and readers will be directed to your company for the full details of the research, giving you a chance to communicate directly with interested members of the pension and investment management community.

Elements of a co-sponsored research study can include the following

- Questionnaire development (10-30 questions)
- Selection of targeted names from the PLANSPONSOR database of retirement plans, advisers, or providers (selectable by plan type, assets, geography, and title)
- Programming of questionnaire for online response
- Solicitation and collation of responses (anonymous)
- Response calculation and delivery to you in Excel format, and PowerPoint presentation
- Design of 4-page co-sponsored piece in PLANSPONSOR magazine, including story and charts, with quotes from your firm
- PDF file of results as published
- Editorial mention of research in the NewsDash, with a link to the piece

Specifications

Allow at least three months from questionnaire finalization to research publication in *PLANSPONSOR*.

Cost

\$25,000 – \$120,000, depending on length of questionnaire, target market, and scope of project.

Accepting Responsibility

How often do you review the performance of investments in the rolling and monthly of your 401(k) or 408(a) plan, and how do you assess investment risk?

Frequency	All	Most	Some	None	Don't Know
Monthly	10%	15%	25%	40%	10%
Quarterly	15%	20%	30%	30%	15%
Annually	20%	25%	35%	15%	5%
Never	5%	10%	20%	55%	10%
Don't Know	5%	5%	5%	5%	20%

What is the most important consideration for you when selecting a 401(k) or 408(a) plan?

Consideration	All	Most	Some	None	Don't Know
Investment performance	45%	55%	65%	75%	85%
Investment risk	35%	45%	55%	65%	75%
Investment fees	25%	35%	45%	55%	65%
Investment options	15%	25%	35%	45%	55%
Investment manager	10%	15%	25%	35%	45%
Investment history	5%	10%	15%	25%	35%
Investment reputation	5%	10%	15%	25%	35%

Fiduciary Responsibility

Do you believe you have a fiduciary responsibility to evaluate the underlying investments in your 401(k) or 408(a) plan?

Response	All	Most	Some	None	Don't Know
Yes	80%	85%	90%	95%	100%
No	15%	10%	5%	5%	5%
Don't Know	5%	5%	5%	5%	5%

When selecting your 401(k) or 408(a) plan, do you consider the following?

Factor	All	Most	Some	None	Don't Know
Investment performance	45%	55%	65%	75%	85%
Investment risk	35%	45%	55%	65%	75%
Investment fees	25%	35%	45%	55%	65%
Investment options	15%	25%	35%	45%	55%
Investment manager	10%	15%	25%	35%	45%
Investment history	5%	10%	15%	25%	35%
Investment reputation	5%	10%	15%	25%	35%

Industry Reports

Unique defined contribution benchmarking tools based on feedback from approximately 5,000 employers

PLANSPONSOR Industry Reports in a nutshell

- 50+ pages in pdf format
- Cover DC plans in 49 different industries
- Client plans to others in the same industry and asset class, and overall
- Available with your firm's branding or logo on every page
- Distributable to sales staff or adviser network; post on your client site behind registration

Every survey topic is covered in detail

- Comparisons by asset class
- Comprehensive analysis of dozens of areas of plan design
- In-depth coverage of DC plan design and investments, including:
 - participation rates and eligibility
 - automatic enrollment features
 - investment options
 - target date funds
 - company match
 - loans and hardship withdrawals
 - investment advice
 - plan oversight and administration
 - adviser services

Availability: Late October, 2012

Industries covered

Accounting/CPA Firm/Financial Planning
 Advertising/Marketing/Printing
 Aerospace/Defense
 Agriculture
 Automotive Dealerships/Service
 Automotive Manufacturing/Parts
 Banking-Commercial/Retail
 Building/Construction/Contracting
 Business Services/Staffing
 Chemicals (new)
 Consulting
 Consumer Services
 Credit Union
 Distribution/Manufacturer's Rep/
 Import/Export (new)
 Education-Higher Ed (new)
 Education-K12/Preschool/Daycare (new)
 Environmental, Recycling, Remediation,

Testing, Consulting
 Engineering/Architecture
 Equipment Sales/Leasing/ Service (new)
 Financial Services
 Fortune 1000
 Government/Public Works-City/
 Municipal (new)
 Government/Public Works-County/State/
 Federal (new)
 Healthcare Organization (for profit)
 Healthcare Organization (not for profit)
 Hotels/Gaming/Entertainment/
 Hospitality/Travel
 Insurance/Reinsurance
 Investment Banking/Holding Co (new)
 Labor Union
 Law Firm
 Manufacturing-Consumer Products

Manufacturing-Industrial Products
 Media/Communications/Publishing
 Membership Org/Industry Assn (new)
 Nonprofit Org/Endowment/Foundation
 Oil & Gas/Energy/Mining Pharmaceuticals
 Real Estate
 Religious Org/Social Services (new)
 Research & Development (new)
 Restaurant/Food Service
 Retail
 Technology/Computers/Software
 Telecommunications
 Transportation/Airline
 Utilities
 Wholesale
 403(b) plans
 457 plans



For how long has your organization used your DC provider?

	Overall	More (2000)	Small (2000-2009)	Mid (2010-2011)	Large (2012-15)	More (16-21)
Less than 1 year	3.7%	3.8%	3.6%	2.4%	4.4%	3.7%
More than 1 year but less than 3 years	14.8%	21.7%	13.8%	8.8%	7.6%	7.7%
More than 3 years but less than 5 years	14.2%	15.8%	14.8%	11.7%	8.4%	13.4%
More than 5 years but less than 7 years	13.2%	14.7%	13.3%	12.7%	11.8%	7.1%
More than 7 years	52.8%	48.2%	52.7%	61.8%	67.2%	75.2%
Don't know	2.8%	3.2%	1.8%	1.4%	1.4%	1.8%

Provider Satisfaction Research Report

These reports offer a comprehensive understanding of client perceptions of defined contribution providers—in each asset and market segment in which they compete.

Advantages

- Shows how DC providers are perceived by their own clients
- Presents a detailed picture of plan sponsor opinions
- Provides evaluations of all areas of plan design
- Delivers market-specific analysis for five separate markets
- Measures both sponsor and participant service capabilities

Uses

- Competitive benchmarking for providers, advisers, and plan sponsors to evaluate 48 different DC plan providers
- Objective third-party due diligence for annual plan reviews
- Value-added research for sales calls

Each report includes

- Market summary section
- Participant service and plan sponsor service scores
- Each provider's score per question
- Each provider's rank per question
- Each provider's quartile per question
- Verbatim comments from clients

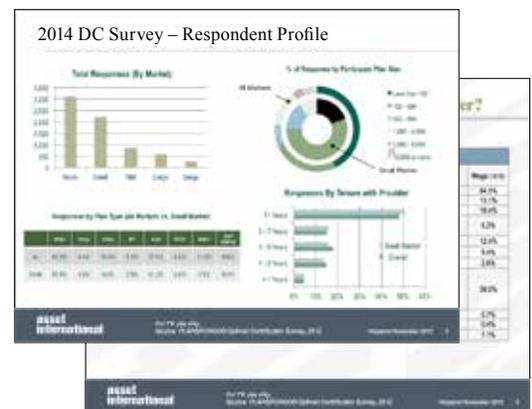
Pricing

• Micro Market (<\$5MM in plan assets)	\$5,500
• Small Market (\$5MM–\$50MM)	\$5,500
• Mid Market (>\$50MM–\$200MM)	\$5,500
• Large Market (>\$200MM–\$1B)	\$5,500
• Mega Market (>\$1B)	\$5,500

Quantity discounts apply.

Contact

Brian O'Keefe
 bokeefe@assetinternational.com
 203-979-3091



Reprints

Use the power of the PLANSPONSOR brand to promote your firm's products, services, and industry expertise. PLANSPONSOR reprints help tell your story, lend credibility and marketing muscle to your promotions. Use reprints as printed collateral or electronic files for Web posting or emailing.

Print

- 80-lb. glossy stock (typical configuration; other configurations available)

QTY	ONE-PAGE/ONE -SIDE			ONE-PAGE/TWO-SIDE			FOUR-PAGES/BOOKLET		
	B/W	2 COLORS	4 COLORS	B/W	2 COLORS	4 COLORS	B/W	2 COLORS	4 COLORS
100	\$416	\$567	\$824	\$523	\$747	\$1,174	\$713	\$1,128	\$1,767
250	\$432	\$582	\$1,015	\$548	\$856	\$1,457	\$762	\$1,277	\$2,539
500	\$711	\$788	\$1,056	\$839	\$1,003	\$1,550	\$1,148	\$1,524	\$2,626
1,000	\$778	\$873	\$1,138	\$891	\$1,104	\$1,735	\$1,272	\$1,761	\$2,807
1,500	\$860	\$934	\$1,288	\$989	\$1,224	\$1,916	\$1,427	\$1,954	\$3,028
2,000	\$937	\$1,036	\$1,437	\$1,082	\$1,342	\$2,091	\$1,581	\$2,141	\$3,250
2,500	\$1,004	\$1,116	\$1,504	\$1,169	\$1,450	\$2,158	\$1,730	\$2,362	\$3,430
3,000	\$1,071	\$1,201	\$1,571	\$1,251	\$1,557	\$2,225	\$1,880	\$2,475	\$3,605

Electronic Reprints–PDF

- Four pages: \$3,750
- Six pages: \$4,250
- Eight pages: \$4,750

PDF Usage Guidelines

- Posting to website; distribution via email; and unlimited print directly from PDF.

Copyright

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Cancellation

- \$200 charge to cancel order prior to printing; orders canceled after printing will be billed at the full rate

Additional Information

- If you would like a PDF set up for printer use, there is an additional fee of \$850.
- Additional fees apply for photos, illustrations, disclaimers, and logos.
- Shipping charges are additional. All reprints are shipped via UPS ground unless otherwise instructed.



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