A highly engaged, loyal subscriber base

**TRUSTED**
97% Near-perfect trust score in a recent reader survey

**FINANCIAL**
97% Investors and financial professionals in a recent reader survey

**BRAND-SAFE**
100% Ethical, original, expert content readers can’t find anywhere else
Launch of the Kiplinger Letter pioneered a terse, colloquial writing style. It covered world affairs, business, and investing.

1947

Founded in 1947 as Kiplinger Magazine (subtitled “The Changing Times”), was the 1st finance magazine in the USA.

1993

Kiplinger’s Web site, launched, featuring an array of money management content, tools, news, and more.

1996

2011

Launch of Kiplinger.com’s Wealth Creation professional channel featuring 400+ financial advisor Contributors.

2015

Kiplinger’s acquired by Dennis Publishing. Adds Money magazine subscribers. Continues to report on finance with 64+ financial journalists and editors.

2019
Digital
7.4 million avg monthly unique visitors
Premium Financial Consumers

*Investing  Retirement  Wealth  Money  Tax  Business*

$340k
Average HH income

$2.4m
Average HH net worth

46%  54%

Net Worth

Liquid Asset Levels
Delivering High Quality Financial Buyers

Kiplinger Readers Have or Are Interested In (past 30 days)

- Credit Cards: 100.0%
- IRAs or 401Ks: 90.0%
- Mutual Funds: 85.0%
- Stock Trader: 80.0%
- Mortgage: 75.0%
- Real estate or REITs: 70.0%
- Investment Account: 65.0%
- Self-Directed Investor: 60.0%
- Bonds: 55.0%
- Annuities: 50.0%
- Educational Loan: 45.0%
- Higher Education: 40.0%
- Refinancing: 35.0%

* Source: IPSOS 2020
Reach Ready to Take Action Consumers

Kiplinger Readers Plan to... (in next 12 months)

- Invest in stocks, mutual funds, etc.
- Purchase electronic items
- Renovate home
- Buy or lease an automobile
- Open or move an investment account
- Open or move a retirement account
- Buy Jewelry costing $2,500+
- Purchase Cell phones
- Change careers or jobs
- Employ or change a financial planner
- Enroll in continuing education
- Start a new business
- Refinance a mortgage
- Retire full time/part time

* Source: IPSOS 2020
Reach High Level
Financial Decision Makers

Kiplinger Readers Are (past 30 days)

- Primary Financial Decision Maker: 180,000
- Financial Professional: 10,000
- C-level Executive: 40,000

* Source: IPSOS 2020
<table>
<thead>
<tr>
<th>Email Newsletter</th>
<th>Subscribers</th>
<th>Schedule</th>
<th>Open Rate</th>
<th>Ad CTR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily email keeping readers up-to-date on a variety of Personal Finance, Investing, Retirement, Business editorial.</td>
<td>610K</td>
<td>Daily</td>
<td>15%</td>
<td>1%</td>
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<tr>
<td><strong>A STEP AHEAD &gt; The Road Forward</strong></td>
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<tr>
<td>Insight and guidance on how to navigate major disruptions and challenges to business, the economy, and financial markets.</td>
<td>630K</td>
<td>M, W, F</td>
<td>15%</td>
<td>1%</td>
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<tr>
<td><strong>Kiplinger Special Report BUILDING WEALTH</strong></td>
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<tr>
<td>Financial pros across the country share best practices and fresh tactics to preserve and grow your wealth.</td>
<td>150K</td>
<td>W</td>
<td>21%</td>
<td>1%</td>
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<tr>
<td><strong>Kiplinger Special Report GREAT TIPS FOR YOUR RETIREMENT</strong></td>
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<tr>
<td>Your twice-a-week guide to planning and enjoying a financially secure and richly rewarding retirement.</td>
<td>140K</td>
<td>M, Th</td>
<td>24%</td>
<td>1.6%</td>
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<tr>
<td><strong>Kiplinger’s Closing Bell</strong></td>
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<tr>
<td>Daily analysis for investors at the close of the market each day.</td>
<td>250K</td>
<td>M-F</td>
<td>18%</td>
<td>1%</td>
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</tbody>
</table>
Your Money’s Worth is a new personal-finance podcast from Kiplinger that delivers timely, actionable guidance to help you earn, keep and make the most of your money. Each new weekly episode has down-to-earth insights on saving for retirement, cutting your tax bill, investing for growth and income, maintaining good credit, and much more.

**POPULAR EPISODES**

- What You Should Know About ETFs  **Most downloaded episode ever**
- Stock Market Winners, Losers and Lessons Learned
- Undervalued Stocks Worth a Look
- The Future of Retirement
- Still Need to File Your Taxes?
- Where to Invest Right Now
- Outlook for Dividend Stocks Right Now
Native Content Program

NATIONAL POLLS
VIRTUAL EVENTS
IMMERSIVE CONTENT
MICROSITES
FILM PRODUCTION
BRANDED CONTENT
CUSTOM PUBLISHING
Native Content Program

**Build Your Brand Reputation** by aligning with Kiplinger’s trusted editorial reputation.

**Educate Consumers** on your financial offerings.

**Increase Loyalty** and retention by providing informed industry content

**Generate Quality Leads** by capturing in-market consumers.

---

**Native Content Syndication**

We host content **provided by partner** on a native page on Kiplinger.com. The content may be promoted across Kiplinger.com, email, social platforms, and sister websites.

**Optional:** For an additional fee, Kiplinger Studio can edit content to increase content quality and marketability (time spent, engagement rates, brand trust, etc.)

**Native Content Syndication + Custom Content**

Kiplinger Studio will create content with custom topics and content elements to meet your brand objectives. Partner will have 100% ownership of content. Additional Fees apply.

---

**Discovery**

Custom Articles, Infographics, Custom Reports, Quizzes

**Education**

eGuides, How-Tos, Virtual Events, Podcasts, Q&A Interviews, Videos, White Papers, Custom Articles

**Decision**

Comparison Guides, eBrochures, Try and Tells, Appointment Calendars, Virtual Demo Experiences

**Native**

Custom Promotion Value-Add

Cost-per-View Pricing

Guaranteed Visitors
## Live Events

### On-Demand Webinars

<table>
<thead>
<tr>
<th>Description</th>
<th>Format</th>
<th>Pre</th>
<th>During</th>
<th>Post</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>• Pre-recorded webinar on topic agreed with client.</td>
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<td></td>
<td>• Host and independent speaker provided by Kiplinger with additional panel seats for client representatives and/or customers</td>
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<td></td>
<td>• Registration page created plus calendar invites/reminders</td>
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<td></td>
<td>• Opportunity for client to host complimentary content on the webinar page</td>
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<td></td>
<td>• Series of 3-4 pre-recorded video sessions broadcast mock-live over a morning or afternoon</td>
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<td></td>
<td>• Moderated by the Kiplinger editorial team</td>
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<td></td>
<td>• Mixture of session formats available including: Q&amp;As, fireside chats, case studies, panel discussions, walkthroughs, and whiteboard talks, final line-up tbd.</td>
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<td>• Registration page created plus calendar invites/reminders</td>
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<td>• Series of 3 pre-recorded video sessions plus 1 panel discussion video</td>
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<td>• Broadcast mock live over 3 weeks</td>
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<td>• Moderated by the Kiplinger editorial team</td>
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<td></td>
<td>• Interview-style format with client industry experts and customers</td>
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<td></td>
<td>• Registration page created plus calendar invites/reminders</td>
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<td>• On-site takeover (4 hours)</td>
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<td>• Display advertising (4 weeks)</td>
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<td></td>
<td>• Editorial feature within relevant articles</td>
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<td></td>
<td>• Inclusion in 5 Kiplinger newsletters</td>
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<td></td>
<td>• Sponsored promotion across social channels</td>
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<td></td>
<td>• Optional sponsorship across Dennis sister sites</td>
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<td></td>
<td>• On-going campaign management and reporting</td>
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<td></td>
<td>• 1-2 video:15-30 sec commercial spots</td>
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<td>• Includes 200 guaranteed registrants (name, email)</td>
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<td>• Available on-demand post event</td>
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<td>• Available on-demand post event</td>
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<td></td>
<td>• Post-event round-up email sent to attendees</td>
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<td></td>
<td>• Available on-demand post event via a dedicated series landing page</td>
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#### Minimum Investment

- **$40,000**
- **$100,000**
- **$150,000**
What Clients Say about Kiplinger’s Brand Studio

KIP Custom Content creates content that is highly relevant to your target audiences and meets your specific communications objectives.

Specialized expertise in investing, retirement, personal finance, and business topics. Award-winning reporters and editors.

"Our customers gave Kiplinger custom content our highest scores ever in focus groups."

"Record-setting engagement levels."

"Most-effective (and easiest) content group to work with ever. You guys know what you’re doing!"

"OUTSTANDING work as usual."
Digital Portfolio Samples

A New Tool Takes the Worry Out of Retirement Withdrawals

Sponsored Content From Pershing Capital

What About the 4% Rule?

Several rules of thumb exist that can guide investors as they look to withdraw their retirement savings. One of the most well-known is the so-called “4% rule,” which says investors can withdraw 4% of their retirement funds each year in perpetuity. This rule was developed based on historical stock market returns and was intended to provide investors with a comfortable retirement income. However, recent studies have shown that the 4% rule may not be sufficient to provide sustainable retirement income in today’s market conditions.

The rule suggests that investors can withdraw 4% of their retirement fund in the first year of retirement and adjust the withdrawal amount based on inflation each subsequent year. For example, if an investor withdraws $50,000 in the first year of retirement, they would withdraw $52,000 in the second year, $54,000 in the third year, and so on. However, the actual performance of the stock market will determine how much money is actually available for withdrawal. The rule is intended to provide a guideline for investors to ensure they have enough money to last throughout their retirement.

Using Smart Withdrawals™ Is Easy

Smart Withdrawals™ is a service offered by Pershing that provides a structured approach to retirement income withdrawal. The service is designed to help investors ensure they have enough money to last throughout their retirement by providing a predictable and consistent stream of income.

The service is available to investors who have a minimum balance of $1 million and is offered through a fee-based approach. Investors can choose to withdraw a fixed amount each month or have it adjusted based on their needs and the performance of their investment portfolio.

The service is designed to provide investors with peace of mind by helping them ensure they have enough money to last throughout their retirement. The service is offered by Pershing, a leading provider of investment management services.
Print
Why Kiplinger magazine readers are your best prospects

They engage with the content

55/45% Male/Female
56 years Average age

Resources to invest

94% Take action as a result of the content
95% Active managers of their personal finances

Access to purchasing power

128k Median HHI
1.5m Average investable assets
The first personal finance brand

For more than 100 YEARS, Kiplinger has provided expert, trusted advice

Kiplinger’s Personal Finance
465,000 avg monthly subscribers

Kiplinger’s Retirement Report
75,000 avg monthly subscribers

Kiplinger’s Retirement Planning Guide
(newsstand only, annual special interest publication)

Kiplinger’s Letters (B2B) – The Letter, Tax, Investing for Income
163,000+ total subscribers
<table>
<thead>
<tr>
<th>ISSUE</th>
<th>EDITORIAL</th>
<th>AD CLOSING</th>
<th>CREATIVE DUE</th>
<th>ON SALE</th>
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<tr>
<td>January</td>
<td>Where to Invest in 2021</td>
<td>10/30/20</td>
<td>11/2/20</td>
<td>12/8/20</td>
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<td></td>
<td>Plus: Get a Higher Yield on Your Savings</td>
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<td>February</td>
<td>Retire When You Want</td>
<td>11/27/20</td>
<td>11/30/20</td>
<td>1/5/21</td>
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<td>Plus: Best Robo Adviser for You</td>
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<td>March</td>
<td>Save Money on Your 2020 Tax Return</td>
<td>1/4/21</td>
<td>1/4/21</td>
<td>2/9/21</td>
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<td>Plus: Our Annual Mutual Fund Winners</td>
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<td>April</td>
<td>Clean Up With Green Investing</td>
<td>1/29/21</td>
<td>2/1/21</td>
<td>3/9/21</td>
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<td>Trim the Cost of Health Care</td>
<td>2/26/21</td>
<td>3/1/21</td>
<td>4/6/21</td>
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<td>Plus: The Kiplinger 25 Top Mutual Funds</td>
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<td>June</td>
<td>How to Make 10% on Your Money</td>
<td>4/2/21</td>
<td>4/5/21</td>
<td>5/11/21</td>
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<td></td>
<td>Plus: Best Rewards Cards</td>
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<td></td>
<td>Plus: How to Get a Deal on Practically Anything</td>
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<td>August</td>
<td>Great Places to Retire</td>
<td>5/28/21</td>
<td>5/31/21</td>
<td>7/6/21</td>
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<td></td>
<td>Plus: Best Banks</td>
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<td>September</td>
<td>10 Ways to Get Your Finances Back in Shape</td>
<td>7/2/21</td>
<td>7/5/21</td>
<td>8/10/21</td>
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<td>Plus: The Best ETFs to Buy Now</td>
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<td>October</td>
<td>Income for Life: Create a Retirement Paycheck</td>
<td>7/30/21</td>
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<td>9/7/21</td>
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<td>Plus: The Best Brokers</td>
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<td>November</td>
<td>How to Be a Better Investor</td>
<td>9/3/21</td>
<td>9/6/21</td>
<td>10/12/21</td>
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<td>December</td>
<td>Year-End Money Moves</td>
<td>10/1/21</td>
<td>10/4/21</td>
<td>11/9/21</td>
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<td>Plus: Best Customer Service Awards</td>
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</table>

Retirement Planning Guide Summer 2021
This special newsstand-only guide will show readers workable, realistic strategies for achieving their retirement goals.
Kiplinger readers are your best prospects

They engage with the content

- 5.5 minutes average time spent online per visit
- 73 minutes average time spent reading each print issue

They have resources to invest

- $1.5m average investable assets for print subscribers
- $750k average investable assets for online readers

The result: You gain access to impressive purchasing power

- $1.4 trillion number of engaged print subscribers x average investable assets
- $3 trillion number of engaged digital readers x average investable assets
Kiplinger readers take action after seeing your ads

A magazine reader opened a $300,000 high yield savings account with an online bank.

A digital reader funded a $525,000 account with a major asset manager.

A newsstand reader moved a $1 million portfolio to a wealth management firm.
Expanded **reach** with *The Week*

Target even more wealthy, engaged and responsive subscribers with Kiplinger's sister platform

<table>
<thead>
<tr>
<th></th>
<th>Kiplinger's</th>
<th>THE WEEK</th>
<th>COMBINED</th>
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<tbody>
<tr>
<td>Average print circulation</td>
<td>500,000</td>
<td>450,000</td>
<td>Almost 1 million</td>
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<tr>
<td>Monthly unique visitors</td>
<td>7.4+ million</td>
<td>15+ million</td>
<td>More than 22 million</td>
</tr>
<tr>
<td>Opt-in email subscribers</td>
<td>650,000+</td>
<td>500,000+</td>
<td>More than 1.1 million</td>
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Thank you

For more information

PAUL VIZZA
Publisher
202.887.6558
Paul_Vizza@Kiplinger.com

STEVIE LEE
Associate Publisher
202.266.3620
Stevie_Lee@Kiplinger.com

MAGGIE KINSKY
Advertising Account Director
202.266.3624
Maggie_Kinsky@Kiplinger.com

BARBARA CLARK
Brand Studio Director
202.887.6515
Barbara_Clark@Kiplinger.com