

# CFA Institute

## 2012 MEDIA KIT



A Shared Vision  
Our Audience  
CFA Institute Magazine  
Financial Analysts Journal  
Online Opportunities

# A Shared Vision

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Connecting you to leading practitioners in investments and finance, the CFA Institute Business Development team is focused on helping you achieve your goals. We will consult with you to customize an integrated marketing plan to meet your firm's needs.

## **Who we are**

CFA Institute delivers access to more than 106,000 influential investment management decision makers in more than 130 countries. A global community dedicated to promoting the highest educational, ethical, and professional standards in the investment industry, CFA Institute has offices in New York, London, Hong Kong, Brussels, and Charlottesville, Virginia. We offer a range of educational and career resources, including the Chartered Financial Analyst® (CFA®) and the Certificate in Investment Performance Measurement (CIPM®) designations.

## **Building partnerships**

Our team's mission is to deliver the latest financial industry research, products, and services to CFA Institute members. We are committed to collaborating with our industry supporters to aid them in communicating the value of their offerings.

On behalf of the Business Development team, we look forward to working with you.

Regards,

Tom Sours, *Manager, Business Development*  
Andy Jenkins, *Corporate Sales Representative*

## *Past supporters include*

*Advent Software, Inc.*  
*Allianz Global Investors*  
*BlackRock*  
*Bloomberg*  
*BMO Capital Markets*  
*BNY Mellon*  
*Capital IQ*  
*Charles Schwab Institutional*  
*Chicago Board Options Exchange*  
*CME Group*  
*Credit Suisse Asset Management*  
*Deloitte*  
*Dow Jones*  
*DST Global Solutions*  
*EUREX*  
*FactSet Research Systems*  
*Institutional Investor Journals*  
*Invesco PowerShares*  
*John Wiley & Sons, Inc.*  
*Loomis Sayles & Co. Inc.*  
*McGraw-Hill Professional*  
*Morningstar, Inc.*  
*MSCI, Ltd.*  
*PIMCO*  
*Quantitative Services Group LLC.*  
*RBC Capital Markets*  
*Russell Investments*  
*Standard & Poor's*  
*State Street*  
*Thomson Reuters*  
*TMX Montreal Exchange*  
*Windham Capital Management, LLC*  
*Wilshire Associates*

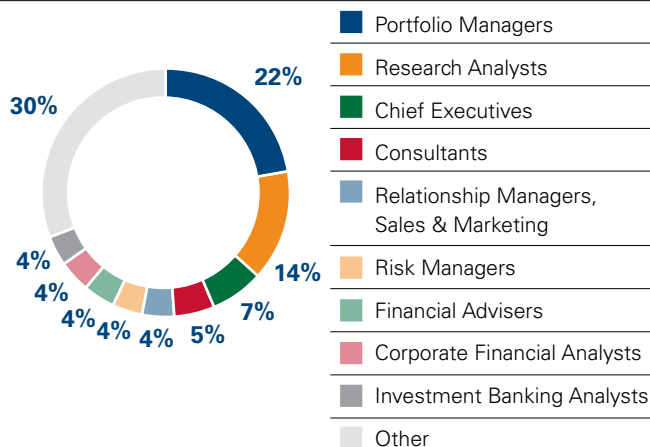
# Our Audience

## Membership Profile

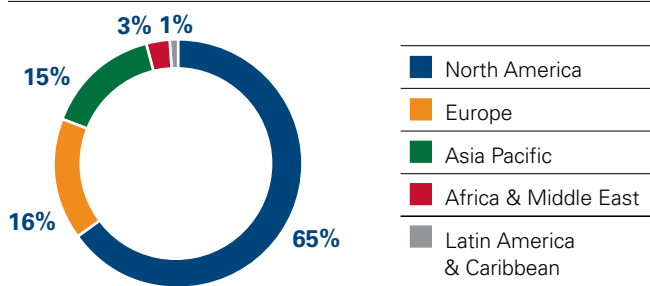
CFA Institute sets the highest standards of ethics, education, and professional excellence for the investment industry. The organization educates investment professionals using its Global Body of Investment Knowledge™, which covers all aspects of the investment profession, including ethics.

CFA Institute has more than 106,000 members in more than 130 countries, 90 percent of whom are CFA charterholders. Our members are primarily portfolio managers, research analysts, chief executives, consultants, investment banking analysts, and financial advisers.

### OCCUPATIONAL PROFILE

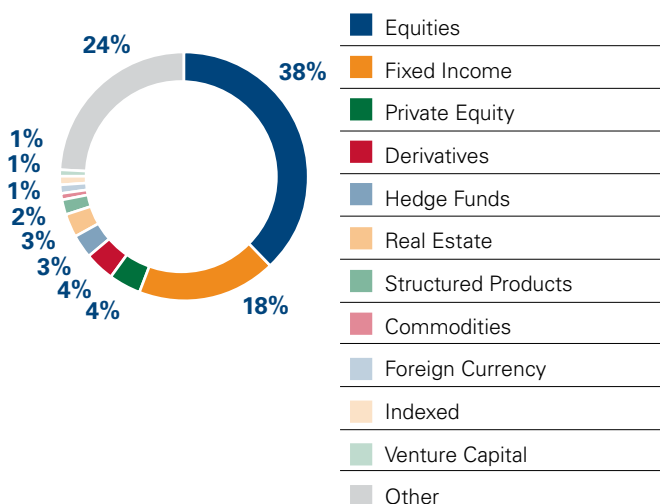


### GEOGRAPHIC PROFILE

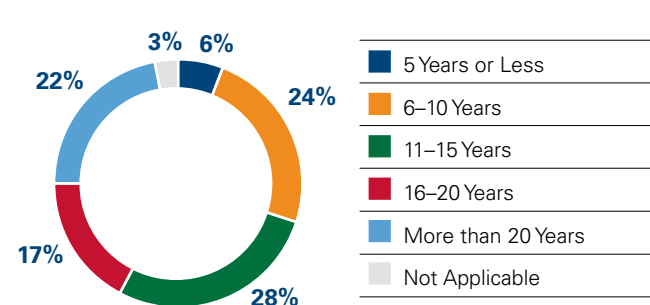


*67% of CFA Institute members have more than 10 years of experience*

### INVESTMENT PRACTICE



### YEARS IN INDUSTRY

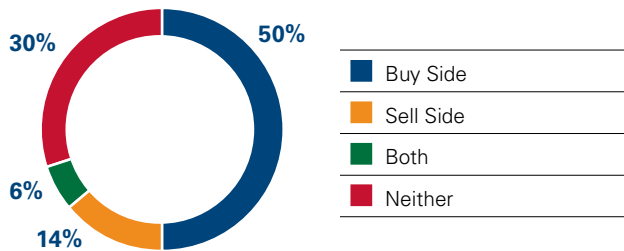


Data are based on self-reported demographic and employment data from CFA Institute members as of 1 August 2011. Percentages may not add to 100% due to rounding.

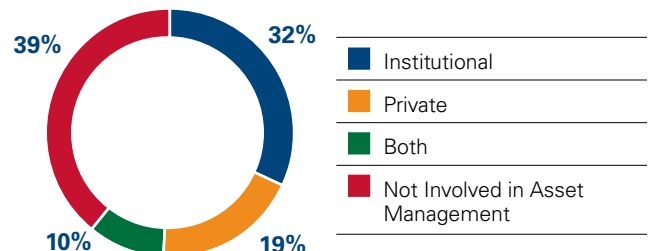
# Our Audience

## Membership Profile

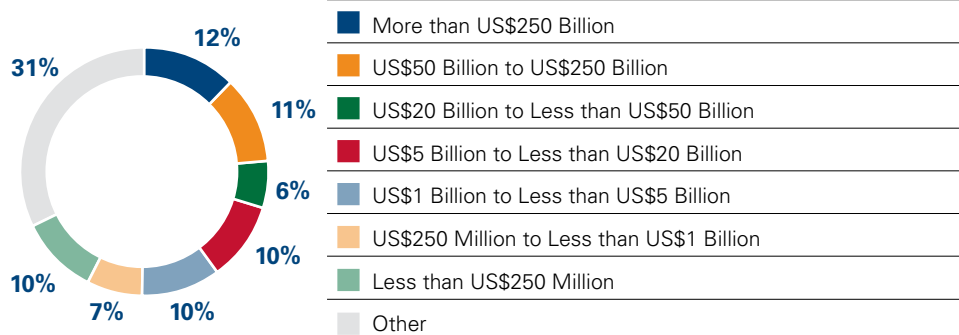
### BUY SIDE/SELL SIDE



### PRIMARY ASSET BASE



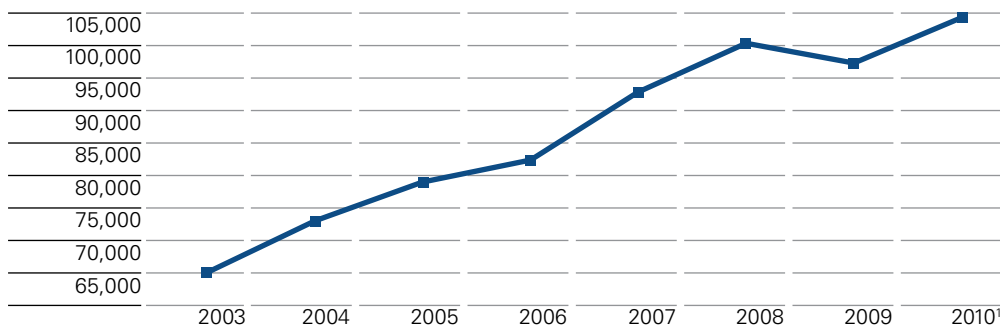
### ASSETS (AUM) IN US DOLLARS



These results represent members identified as asset managers.

*90% of CFA Institute members are charterholders*

### MEMBERSHIP GROWTH



<sup>1</sup>Projected

*Some of the top employers of CFA charterholders include:*

- Bank of America Merrill Lynch
- Bank of New York Mellon Corp.
- Barclays
- BMO Financial Group
- BNP Paribas Fortis
- CIBC World Markets Inc.
- Citigroup
- Credit Suisse
- Deutsche Bank
- FMR Corporation
- Goldman Sachs
- HSBC
- ING Group
- JP Morgan Chase
- Morgan Stanley Smith Barney
- PricewaterhouseCoopers
- RBC
- TD Bank Financial Group
- UBS
- Wells Fargo

#### OUR AUDIENCE

CFA Institute Magazine  
Financial Analysts Journal  
Online Opportunities

# CFA Institute Magazine

## Circulation Analysis



### Editorial Focus

CFA Institute Magazine strives to provide reporting and opinion on issues that matter to practitioners in a rapidly evolving global investment industry.

### Editors

Roger Mitchell, *Managing Editor*  
Jamie Underwood, *Assistant Editor*

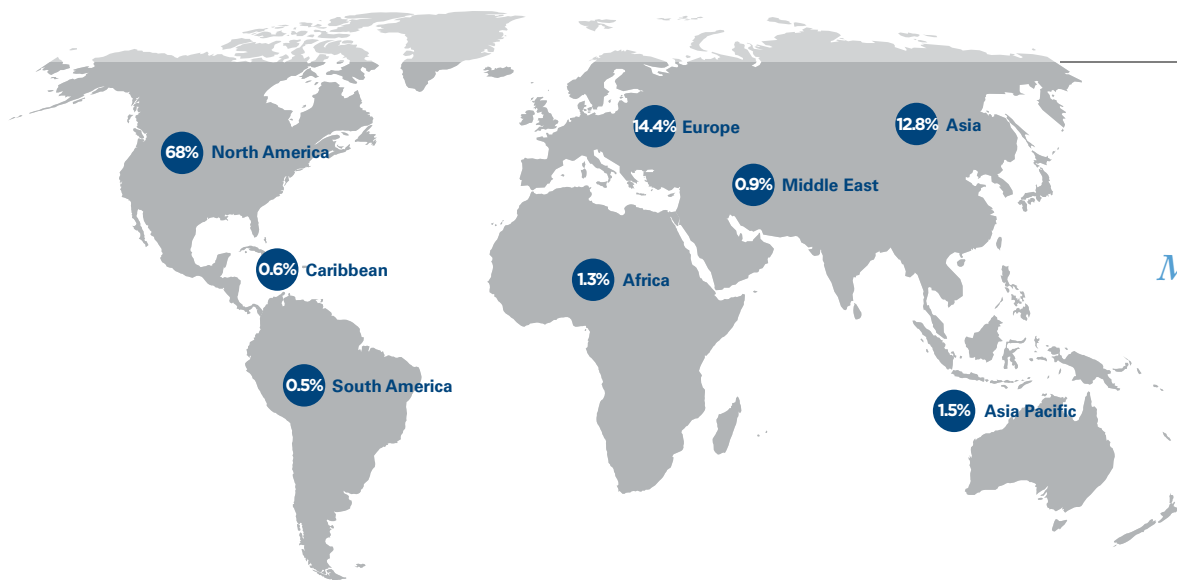
### Launch Date

2003

### CFA Institute Membership

106,720

Total Circulation: 105,198<sup>1</sup>



**66%**  
of members read  
CFA Institute  
Magazine within  
one week of  
receiving it<sup>2</sup>

**20%**  
of members read  
CFA Institute  
Magazine within  
the month<sup>2</sup>

Shared Circulation: 131,498<sup>1</sup>

Our audience  
**CFA INSTITUTE MAGAZINE**  
Financial Analysts Journal  
Online Opportunities

<sup>1</sup>Data as of November/December 2010. For Audited Circulation details, see the BPA Worldwide statement.

<sup>2</sup>Data from November 2010 CFA Institute Publications Survey of members.

# CFA Institute Magazine

## Media Specs & Rates

### PUBLISHING SCHEDULE




Issue	Insertion Date	Materials Due	Publication Date
November/December	16 September 2011	30 September 2011	week of 31 October
January/February	11 November 2011	25 November 2011	week of 26 December
March/April	13 January 2012	27 January 2012	week of 27 February
May/June	16 March 2012	30 March 2012	week of 30 April
July/August	18 May 2012	1 June 2012	week of 2 July
September/October	13 July 2012	27 July 2012	week of 27 August
November/December	14 September 2012	28 September 2012	week of 29 October

### RATE SHEET

Space Size	Color	1X	3X	6X	12X	18X
Full-Page Spread	4 Color	\$20,000	\$19,000	\$18,000	\$17,000	\$16,000
Full Page	4 Color	10,000	9,500	9,000	8,500	8,000
Half Page	4 Color	6,000	5,500	5,000	4,500	4,000
Back Cover	4 Color	13,000	12,500	12,000	11,000	10,500
Front Inside Cover	4 Color	12,000	11,500	11,000	10,000	9,500
Back Inside Cover	4 Color	11,000	10,500	10,000	9,500	9,000

Note – CFA Magazine is now available in print and online formats. All print advertisements will also run in the e-zine version and will include active web links. Advertisers have the option to upgrade their online ad to include integrated multimedia capability. This multimedia upgrade is available for just \$1,000 more than the above print ad rates.

### PRINT AD SPECIFICATIONS

Ad Size	Full-Page Spread	Full Page	Half Page
			
Trim (W x H)	16½ x 10 7⁄8	8¼ x 10 7⁄8	7 x 4 7⁄8
Bleed	16¾ x 11 1⁄8	8½ x 11 1⁄8	7¼ x 5

All text, logos, borders, and boxes that do not bleed should stay within ¼-inch of trim.

### ADVERTISING & MATERIALS CONTACT

#### Ad Placement

Andy Jenkins  
CFA Institute  
560 Ray C. Hunt Drive  
Charlottesville, VA 22903 USA  
Phone: 434 951 5532  
E-mail: andy.jenkins@cfainstitute.org

#### PDF Files, Proofs, Artwork

Matthew Hepler  
CFA Institute  
560 Ray C. Hunt Drive  
Charlottesville, VA 22903 USA  
Phone: 434 951 5521  
E-mail: matthew.hepler@cfainstitute.org

#### Printing Method

Web offset. SWOP standards apply. 150-line screen.

#### Marks

Crop marks and registration marks should be at least 12 points from the trim edge.

#### File Format

High-res PDF to native files (press quality) with fonts embedded. For all ads, elements must be laced to 100% size. Supply a digital color proof or laser proof demonstrating accurate color.

#### Fonts

Postscript Type1. Use stylized fonts. Do not apply style attributes to basic fonts. Font information should include manufacturer, font name, and version.

#### Images/Scans

TIFF or EPS with a resolution of at least 300 dpi. Line art, such as logos, should be EPS at 1200 dpi. All color images and scans must be in CMYK. Total combined ink coverage should not exceed 300 percent.

#### Compatible Media

CD-ROM, e-mail (file size up to 10MB), or contact matthew.hepler@cfainstitute.org for FTP information.

#### Production Charges

Billed at cost. Pantone color price is \$546.

#### Inserts, Issue Wraparounds, Belly Bands

Contact Coyne & Associates for rates and specifications.

Our audience  
**CFA INSTITUTE MAGAZINE**  
Financial Analysts Journal  
Online Opportunities

# Financial Analysts Journal

## Circulation Analysis



### Editorial Focus

The *Financial Analysts Journal (FAJ)* provides high-quality, practitioner-relevant research in investment analysis and management through the perspectives of leading practitioners, academics, and industry regulators.

### Editors

Robert Litterman, *Executive Editor*  
Rodney Sullivan, CFA, *Editor*  
CFA Institute

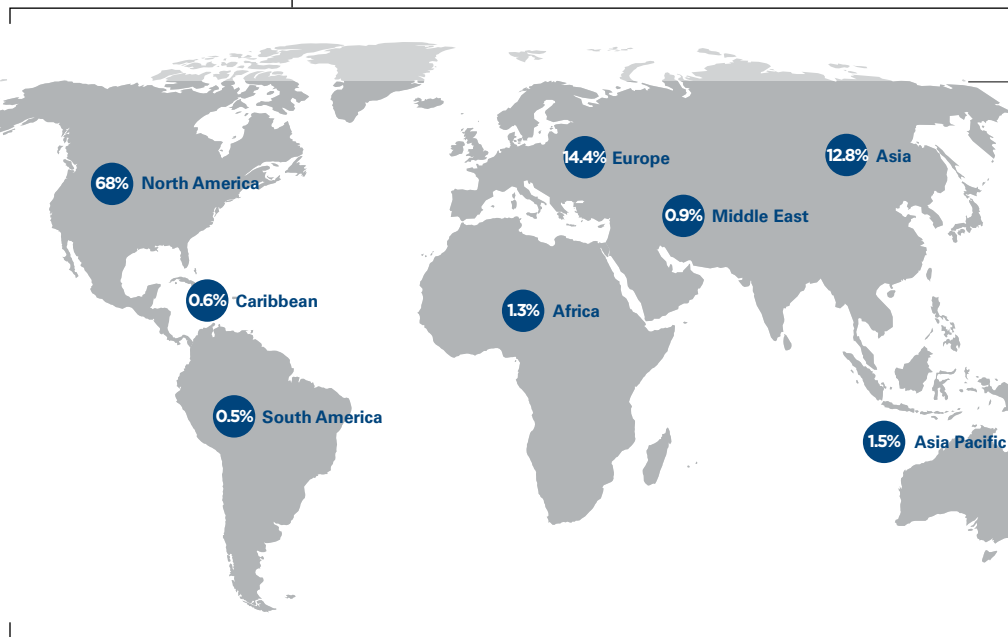
### Launch Date

1945

### CFA Institute Membership

106,720

Total Circulation: 107,338<sup>1</sup>



82%  
of the CFA  
Institute  
membership  
reads *FAJ*<sup>2</sup>

26%  
of members share  
their *FAJ* with  
one to three other  
members<sup>2</sup>

Shared Circulation: 135,246<sup>1</sup>

Our audience  
CFA Institute Magazine  
**FINANCIAL ANALYSTS JOURNAL**  
Online Opportunities

<sup>1</sup>Data as of November–December 2010. For Audited Circulation details, see the BPA Worldwide statement.

<sup>2</sup>Data from November 2010 CFA Institute Publications Survey of members.

# Financial Analysts Journal

## Media Specs & Rates


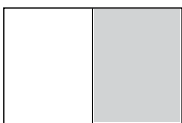
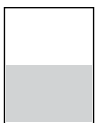
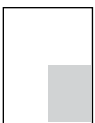
### PUBLISHING SCHEDULE

Issue 2012	Insertion Date	Materials Due	Publication Date
January/February	28 November 2011	7 December 2011	week of 23 January
March/April	6 February 2012	15 February 2012	week of 26 March
May/June	2 April 2012	11 April 2012	week of 21 May
July/August	4 June 2012	13 June 2012	week of 23 July
September/October	6 August 2012	15 August 2012	week of 24 September
November/December	1 October 2012	10 October 2012	week of 19 November

### RATE SHEET

Space Size	Color	1X	3X	6X	12X
Full-Page Spread Contact Coyne & Associates for rates.					
Full Page	B&W	\$6,800	\$6,500	\$5,800	\$5,400
	2 Color	7,800	7,400	6,700	6,300
Half Page	4 Color	8,500	8,100	7,300	6,900
	B&W	4,800	4,500	4,100	3,800
Quarter Page	2 Color	5,900	5,600	5,100	4,800
	4 Color	6,600	6,300	5,800	5,400
Cover 2	B&W	3,400	3,200	2,900	2,700
	2 Color	4,200	4,000	3,600	3,400
Cover 3	4 Color	4,700	4,500	4,100	3,800
	4 Color	9,400	9,000	8,200	7,700
Cover 4	4 Color	9,400	9,000	8,200	7,700
	4 Color	10,900	10,400	9,300	8,900

### PRINT AD SPECIFICATIONS

Ad Size	Two Page Spread	Full Page	Half Page	Quarter Page
				
Trim (W x H)	16½ x 10 7⁄8	8¼ x 10 7⁄8	7 x 4 7⁄8	3 3⁄8 x 4 7⁄8
Bleed	16¾ x 11 1⁄8	8½ x 11 1⁄8	no bleed on ½ page	no bleed on ¼ page

All text, logos, borders, and boxes that do not bleed should stay within 1⁄4-inch of trim.

### ADVERTISING & MATERIALS CONTACT

#### Space Reservations

Jim Coyne  
Coyne & Associates  
14 Charleston Drive  
Mendon, NY 14506 USA  
Phone: 585 385 3660  
E-mail: jmcadrep@yahoo.com

#### PDF Files, Proofs, Artwork

Lois Carrier  
CFA Institute  
560 Ray C. Hunt Drive  
Charlottesville, VA 22903 USA  
Phone: 434 951 5388  
E-mail: lois.carrier@cfainstitute.org

#### Printing Method

Web offset. SWOP standards apply. 150-line screen.

#### Marks

Crop marks and registration marks should be at least 12 points from the trim edge.

#### File Format

High-res PDF to native files (press quality) with fonts embedded. For all ads, elements must be laced to 100% size. Supply a digital color proof or laser proof demonstrating accurate color.

#### Fonts

Postscript Type1. Use stylized fonts. Do not apply style attributes to basic fonts. Font information should include manufacturer, font name, and version.

#### Images/Scans

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#### Compatible Media

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CFA Institute Magazine  
**FINANCIAL ANALYSTS JOURNAL**  
Online Opportunities

# Online Opportunities

## CFA Institute Financial NewsBrief

Reach purchasing influencers via this e-newsletter that arrives directly in subscribers' in-boxes, featuring news summaries with links to articles from financial publications around the globe. Comprising financial and investment news highlights from around the globe, the CFA Institute Financial NewsBrief provides a daily e-mail brief to our member subscribers and their colleagues.

- Access to 60,000+ investment professionals<sup>1</sup>
- Average daily open rate is over 38 percent

### Option 1: Logo-Text Ad

- Advertiser logo: 160 x 45 pixels. 30k maximum; .gif or .jpg
- Ad Logo: 120 x 110 pixels. 40k maximum; .gif or .jpg
- Copy: 300 characters maximum, excluding spaces, includes a link to any page on your website

### Option 2: Outline Ad

- Advertiser logo: 160 x 45 pixels. 30k maximum; .gif or .jpg
- Headline: 50 characters, excluding spaces
- Copy: 300 characters maximum, excluding spaces, includes a link to any page on your website

### Option 3: Banner Ad

- Advertiser logo: 160 x 45 pixels. 30k maximum; .gif or .jpg
- Banner: 468 x 60 pixels. 60k maximum; .gif or .jpg
- Alternate text (100 characters max) can be embedded behind image

Insertions	5	6-20	21-40	41-60	61-80	81 or more
Top Stories	\$800	\$750	\$700	\$650	\$600	\$550
Market Activity	\$650	\$600	\$550	\$500	\$450	\$400
Economics	\$600	\$550	\$500	\$450	\$400	\$350

All prices are per insertion.

### Advertising Inquiries

Tom Sours  
434 951 5532  
tom.sours@cfainstitute.org

Andy Jenkins  
434 951 5594  
andy.jenkins@cfainstitute.org

Our audience

CFA Institute Magazine  
Financial Analysts Journal  
[ONLINE OPPORTUNITIES](#)

<sup>1</sup>These subscribers represent a subset of our global membership of more than 106,000.