Modern American Advisor
EMPOWERING. ELEVATING. EXCELLING.

PARTNERSHIP GUIDE · 02

Audience Intelligence, Reach And Targeting.

A more intelligent route into the U.S. advisory, RIA, wealth management and family-office market.

INTRODUCTION

A different kind of audience proposition.

Modern American Advisor has been created for partners who need more than broad media exposure. The U.S. advisory market is large, fragmented and commercially complex. RIAs, broker-dealers, family offices, wealth teams, hybrid firms, custodians, technology providers, asset managers, recruiters and acquirers all operate within the same ecosystem, but they do not all matter equally to every campaign.

A conventional media kit might tell you how many people read a publication or receive a newsletter. That information has value, but it is not enough for serious financial services marketers. The more important question is whether a campaign can reach the firms, roles and decision-makers most relevant to the partner's commercial objective.

Modern American Advisor combines premium editorial with proprietary audience intelligence, allowing campaigns to be shaped around the real structure of the advisory market. This is where MAA becomes more than a media platform. It becomes a strategic route into the firms and professionals shaping modern advice.

TARGETING UNIVERSE

A conservative campaign planning universe.

28,000+ RIA firms	**360,000+** Registered representatives and advisory professionals
4,000+ Broker-dealer firms	**20,000+** Mapped wealth teams and advisory team structures
3,500+ Family offices	**600,000+** Wider verified wealth, advisory and family-office profile records

These figures represent a conservative planning universe available through MAA's proprietary audience intelligence layer. They should not be read as subscriber claims or circulation figures. Instead, they show the depth of market intelligence available to support campaign planning, segmentation, research, lead generation, editorial strategy and targeted activation.

For partners, the benefit is precision. A campaign can be designed around the market that matters most: growth-minded RIAs, large advisory firms, firms using particular technology, advisors with relevant investment focus, family offices in specific regions, succession-minded practices, high-AUM teams, ETF users, technology decision-makers, compliance leaders, operational executives or advisor talent segments.

THE INTELLIGENCE LAYER

What the audience intelligence layer includes.

MAA's audience intelligence can support campaign planning across a wide range of firm, advisor and market attributes.

FIRM STRUCTURE

RIA firm type & channel · Broker-dealer affiliation · Hybrid & dual-registration indicators · Family-office profile data

FIRM ECONOMICS

AUM and asset indicators · Growth signals · Ownership & succession indicators · Team and rep relationships

PLATFORM & TECH

Custodian relationships · CRM-ready segmentation · Technology stack indicators · Platform adoption relevance

INVESTMENT & PRODUCT

ETF holdings & category relevance · Asset allocation indicators · Model portfolio & alternatives · Retirement & income focus

BEHAVIOURAL SIGNALS

Breakaway & transition activity · M&A; indicators · Leadership & succession changes · New firm registrations

PEOPLE & ROLES

Role and title intelligence · Verified contact information · Decision-maker mapping · Geography & territory

This depth of data allows campaigns to become more relevant before they are even launched. Instead of beginning with a broad audience and hoping the right people engage, MAA can help partners think carefully about where the opportunity sits, which roles should be influenced and which messages are most likely to resonate.

Why this matters for partners.

Asset Managers And ETF Providers

Asset managers can use MAA's audience intelligence to identify firms by AUM, custodian, product relevance, investment focus, ETF category, client segment, firm size and advisory model. This supports more effective campaigns around fund education, ETF adoption, model portfolios, alternatives, private markets, retirement income and portfolio construction.

WealthTech And AI Firms

Technology companies can use MAA's targeting approach to identify firms by size, workflow maturity, technology stack, custodian relationship, existing platform use, operational structure and likely adoption relevance. This is particularly powerful for AI, CRM, planning, reporting, compliance, portfolio management and client experience campaigns.

Recruiters, Platforms And Acquirers

Recruitment, platform and acquisition campaigns can be shaped around geography, advisor tenure, age profile, firm structure, AUM, growth rate, succession relevance, custodian relationship, team composition and transition signals. This supports advisor attraction, lift-out strategy, M&A; sourcing and succession-led campaigns.

Professional Services And Strategic Partners

Consultants, law firms, valuation specialists, lenders, compliance providers, tax specialists and strategic partners can build campaigns around the advisory firms most likely to need their expertise. The result is sharper positioning and better use of content, email, research, webinars and private events.

FROM DATA TO INFLUENCE

Data alone does not create influence.

Influence is created when data is connected to credible editorial, relevant content, targeted distribution and intelligent follow-up. Modern American Advisor uses its audience intelligence to help partners answer four questions before a campaign begins.

· Who are we trying to reach?

· What do those firms and professionals care about?

· What is the most credible editorial or commercial context for the message?

· What should happen after engagement?

This is how a campaign becomes more than a placement. A research campaign can generate market intelligence, editorial output, webinar content and sales follow-up. A WealthTech campaign can move from awareness to understanding through founder interviews, client success stories, product explainers and live discussion. A recruitment campaign can combine employer brand content with market mapping and advisor engagement. An asset manager can support product education with targeted email, editorial thought leadership and advisor intelligence.

The intelligence defines the market. · The editorial creates credibility. · The campaign builds visibility. · The follow-up creates opportunity.

OWNED MEDIA & CAMPAIGN ACTIVATION

A growing premium editorial platform.

Modern American Advisor is also building a premium owned media environment around the advisory profession. This includes the MAA website, editorial sections, newsletters, digital campaigns, podcasting, video, webinars, print and digital magazine opportunities, special reports, private members activity, social channels and event-led campaigns.

At this stage, MAA does not publish projected website, social, podcast, print or webinar numbers. The stronger and more accurate position is to describe those channels as active and growing, with campaign delivery scoped individually according to the partner's objective.

The most important point is that these channels do not sit separately from the audience intelligence layer. They are activated through it. A partner can use audience insight to shape a campaign, then use MAA's editorial and media environment to bring that campaign to market.

WEBSITE

A growing premium editorial platform

NEWSLETTER & EMAIL

Scoped to campaign objectives and compliant audience permissions

PRINT & DIGITAL MAGAZINE

Premium print and digital magazine distribution, including planned issue and event-led opportunities

PODCAST & WEBINAR

Podcast and webinar campaign formats

SOCIAL

Active and growing social media reach

PRIVATE MEMBERS & EVENTS

Event and private member activity

CAMPAIGN APPLICATIONS

Suggested campaign applications.

AI ADOPTION

Targeting senior technology, operations and compliance leaders across relevant RIA firms.

ETF AWARENESS

Targeting RIAs and investment decision-makers by AUM, custodian, investment focus and product relevance.

RECRUITMENT & SUCCESSION

Targeting advisor teams, firm owners and succession-relevant profiles.

PRIVATE MARKETS

Targeting RIAs, family offices and wealth teams with relevant product interest and client profile.

WOMEN IN FINANCE

Targeting female advisors, leadership teams and firms with talent and development priorities.

BUILD TO A BILLION

Targeting founders, CEOs, managing partners and growth-minded firms focused on scale, succession and enterprise value.

PREMIUM WEBINAR

Targeting a defined advisor segment by role, firm profile and campaign intent.

PLAYVERTO RESEARCH

Turning targeted advisor engagement into market intelligence, content and qualified follow-up.

PARTNER WITH US

A smarter route into the advisory market.

Modern American Advisor gives partners a more intelligent way to understand, reach and influence the U.S. advisory market.

Rather than relying on broad circulation claims, MAA combines premium editorial with a proprietary intelligence layer built around the firms, people, roles and signals that matter most. For partners, that means smarter targeting, better campaign planning, stronger relevance and a clearer route from visibility to commercial opportunity.

NEXT STEPS

Request A Bespoke Audience Plan

Discuss Audience Targeting

Build A Campaign Around Your Market

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