

THE ECONOMY HAS CHANGED...
THE FINANCIAL INDUSTRY HAS CHANGED...
WEALTH MANAGEMENT HAS CHANGED...



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HAS CHANGED, TOO.
COMING MAY 2009

What's Inside the **NEW** onwallstreet

The world of the high-net worth advisor has changed dramatically, but one thing hasn't changed: Events demand context and news demands analysis. **StreetScape** offers a set of short features, columns, and listings that help busy advisors stay ahead of the curve.

Every month, in **By the Rules**, regulatory experts work through the latest compliance challenge, helping wealth managers set a course for success.

Features and cover stories are the heart of our editorial product. The classic *On Wall Street* feature offers strong enterprise reporting with an insider flavor. The new *On Wall Street* will deliver that and more: Look for increased emphasis on the inner workings of firms, profiles of influential personalities, trends that affect the industry and critical analysis of investment strategies and products. This section will also include continued coverage of compensation, Top 40 Advisors Under 40, Top Branch Managers, the Recruiters Roundtable and the Retirement Roundtable.

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The new generation is young, rich and not afraid of risk. Gen Xers have a markedly different approach to investing from their parents and grandparents. Not only are they unwilling to blindly take on their parents' financial counselors, they're also opinionated about the attributes they look for in an advisor when they strike out on their own.



52 Ellyn McColgan: Staying Cool In the Crisis

Ellyn McColgan was a rising star in the financial world. An heir apparent at vaunted Fidelity, she quit when she was passed over for the top job and quickly landed as head of wealth management at Morgan Stanley. Then came the worst financial crisis since the 1930s.

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Your Practice focuses on client prospecting, retention, referrals, and how to build your book of business. Writers will include Gerri Leder and Alan Foxman.

As clients age—and as the quest to convert savings to income grows ever more difficult—advisors increasingly see retirement planning as Job No. 1. Each month, **The Wealthy Retiree** will explore the changing menu of options and strategies advisors can use to meet the needs of their clients.

Life Stories: Every month on the inside back page, *On Wall Street* will present a mini-profile of an advisory firm executive, detailing her accomplishments and describing how she got to the top.

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As transformational change sweeps through the world of wealth management, *On Wall Street* is keeping pace—and raising its game by improving its quality and its utility to the wealth management community.

Over the next several months, readers of our magazine and devotees of our online offerings will encounter some big changes. We have renewed our brand—refining our image and refocusing our editorial mission to reflect the changing nature of our readers and their clients. The changes embrace the demographic, economic, structural, and regulatory changes that are remaking the industry. At the same time, *On Wall Street* has renewed its core commitment to help elite advisors do their jobs better and sharpen their ability to see over the horizon.

Launching in May 2009, the new *On Wall Street* magazine will offer a fresher, more sophisticated design; its contents will be better organized and more accessible.

EDITORIAL FOCUS

On Wall Street's coverage is founded on three pillars, encompassing the topics that are most vital to a wealth manager's success:

- **Professional insight**—Our coverage in this area is unparalleled, consisting of deep analysis of industry change, profiles of key players, and content focused on career advancement and corporate cultural change.
- **Product strategy**—Investment and insurance product recommendations sit at the center of your practice and our editorial mix reflects that. From equity market sectors to the latest hybrid instrument, *On Wall Street's* readers are ahead of the curve.
- **Practice management**—These are the skills that can take an advisor from good to great. From capturing and retaining clients to communicating in a downturn to improving your “referrability quotient,” *On Wall Street* is raising the bar when it comes to practice management coverage.

AUDIENCE

The new *On Wall Street*, audited by BPA Worldwide, will serve an audience of 91,000* direct-request qualified subscribers, with a focus on high-AUM advisors that are primarily based in wirehouses, RIA firms, wealth management offices, and private banking. Honing our focus on these top advisors who manage wealthy clients, the new *On Wall Street* will include extensive coverage of the products and services that appeal to this category such as asset management, annuities, insurance and retirement products.

NEW ONLINE

On Wall Street is also proud to announce a new daily online news service, designed to keep wealth management professionals up-to-date on the events and developments that matter most. The service will go live March 24. Visit www.onwallstreet.com to find out more.

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For more information visit us at www.onwallstreet.com

