

2024 Media Kit

BLUEVAULT™

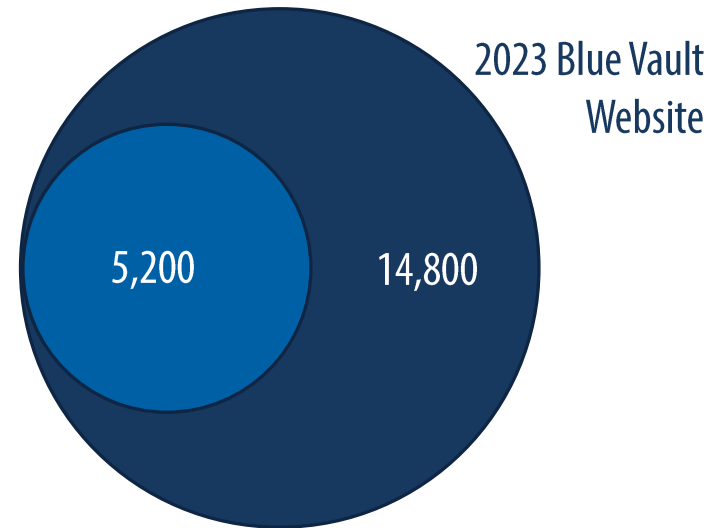
Our Audience

Website:

5,200+ average monthly users

14,800+ average monthly page views

www.BlueVaultPartners.com



Social Media:



12,000+ average monthly impressions

350+ average link clicks

Webinar Program:

2 webinars a month

100+ average monthly registrants

56+ average monthly attendees

Position 1 (970x90)

Questions? info@bluevaultpartners.com | 877-256-2304

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BLUEVAULT

LEARN | NEWS | RESEARCH | INDUSTRY ACCESS | MEMBERSHIP | EVENTS | WHY BLUE VAULT | CONTACT US

FOR WEALTH ADVISORS

Your hub for

ALTERNATIVE INVESTMENTS

Research | Education | Insights | Industry Connections

LEARN MORE

Why Alts | Industry Access | Research | Learning

Learning Opportunities

WEBINARS

THE BLUE VAULT MINUTE

EVENTS

MAY 1, 2024

INSIGHTS FROM THE 2024 NONTRADED REIT FULL-CYCLE STUDY

Join us on Wednesday, May 1, at 2:00 pm EDT for a look inside the 8th Edition Nontraded REIT Full...

OCTOBER 5, 2023

STACY CHILTY: ZOMBIE REITS

Some nontraded REITs continue to live on, despite having paid no distributions for many years and...

OCT 2, 2024

ALTS DAY 2024

Blue Vault's Alts Day is an annual one-day virtual educational event focused on alternative...

APRIL 25, 2024

ALTS AND BLUE VAULT: THE INVESTMENT RISK 'AIRBAG' EQUIPPING FUSION...

Learn more about Fusion Financial Group and consider joining them in becoming a Blue Vault...

APRIL 24, 2024

BLUE VAULT PUBLISHES Q4 2023 NONTRADED REIT INDUSTRY REVIEW

Blue Vault is your hub for Alternative Investments

APRIL 24, 2024

BLUE VAULT PUBLISHES Q4 2023 NONTRADED BDC INDUSTRY REVIEW

Blue Vault is your hub for Alternative Investments

Become a member to access our data and reports. BECOME A MEMBER

Position 2 (970x90)

The alternative investments industry is expected to grow to \$17 trillion by 2025.

LEARN WHY

ALTS STRENGTH IN NUMBERS

\$228.3B
Total Nontraded REIT AUM

\$101.3B
Total Nontraded BDC AUM

\$87.9B
Total Interval Fund AUM

\$256.1B
Nontraded REIT Capital Raise (Since 1990)

"Blue Vault has been an exceptional resource for our firm when it comes to non-traded alternative assets. The BV 'vault' is a wealth of historical data and BV subscriptions and conferences have introduced us to new investment opportunities and sponsors."

Carron Schmick, Direct Investments Specialist at Ridgeline Private Wealth

Position 3 (300x250)

BLUEVAULT
Get access to premium, industry-wide alts content.
BECOME A MEMBER

Website Ad Locations

Position 1 (970x90)

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Home > Firm > Blue Vault > How Alts and Blue Vault Data Propel Creative Capital's Advisory 'Playbook'

How Alts and Blue Vault Data Propel Creative Capital's Advisory 'Playbook'

Blue Vault | Blue Vault Database | Blue Vault Insights | Creative Capital Wealth Management

"The sponsor is a sales person; they're not going to tell you the warts. But when you look at Blue Vault, you can compare one to another. Blue Vault's data is very useful."

Johnathan Rickman | Blue Vault

Maintaining access to a bevy of retail-friendly alternative investment options and Blue Vault membership helps strengthen Creative Capital Wealth Management Group's (CCWMG) advisory strategy, or "playbook," and has allowed the firm to grow and compete with the Vanguards and BlackRocks of the world, says CEO and Chief Wealth Strategist Fred Hubler. For the last year, Fred has been the voice of alternative investments as an online contributor to Forbes.

An inspiring tale of how one advisor broke free of the cubicle farm and went independent, CCWMG is built from the idea that wealth cannot be grown from mutual funds and other listed-market solutions alone. "There are only so many tickers out there, and everyone owns, within mutual funds, the same 1,200 things," Hubler, the firm's founder, said.

Thus, Hubler looked to accredited, alternative investments to both build and differentiate his practice, positioning himself within an industry niche that has since blossomed from a mere buzzword to a \$22 trillion industry representing 15% of global assets under management.¹ Hubler saw alts as a good solution for high-net-worth individuals seeking both wealth management planning and solutions for investing money tied up in real estate.

Hubler's advice to advisors just dabbling in alternative investments: "Do it, don't dabble. I'm doing it and I'm getting your clients," he jokes.

Advice or Access

CCWMG, an alts-focused advisory firm founded in 2003 with headquarters in Spring, PA — literally, Vanguard's backyard — helps high-net-worth individuals access institutional-quality investment platforms in 34 states. The firm offers both retainer-based planning and full-service asset management solutions for investors and Vault member today!

References

¹ <https://iain.org/content/january-2024/news-20-191101/alternativemv-investments>

SHARE f X

Recent

MAY 7, 2024

Reliability, 'Greater Good' Investments Help Frontier...

MAY 2, 2024

Knowledge is the Key to Unlocking Advisor Success...

APRIL 25, 2024

Alts and Blue Vault: The Investment Risk 'Airbag'...

APRIL 4, 2024

The Baltimore Bridge Disaster and Nontraded...

Asset Manager News | Service Provider News | Industry News | Blue Vault Announcements | Webinars | Video Highlights

Asset Manager Perspectives | Service Provider Perspectives | Blue Vault Insights | Inside the Vault | Podcasts | Industry Events

BLUEVAULT

Don't miss alts news and educational events

SUBSCRIBE NOW

Position 2 (300x250)

Become a member to access our data and reports. BECOME A MEMBER

BLUEVAULT™ Digest

If you know someone who would be interested in receiving Blue Vault emails, please forward them this email so they can [sign up](#), too.



Priority Income Fund and Prospect Capital Management Announce Strategic Platform Relationship with +Subscribe®

Priority Income Fund, Inc. ("Priority Income Fund" or the "Fund") and Prospect Capital Management, L.P. ("Prospect Capital") today announced a strategic platform relationship with +SUBSCRIBE®, a leading order management and electronic subscription document platform for the alternative investments industry.

[Read More](#)

Elite (640x100)

Industry News:

Capital Square Completes Acquisition of 324-Unit Farm-Haus Apartment

JPMorgan Looks to Unload Amazon-Leased Office in Santa Monica

Gladstone Commercial Provides a Business Update

Market Intel:

What makes nontraded REITs so different?

Research Brief: Housing

CRE Debt Markets Hit Stormy Waters Amid Rising Interest Rates



Advisor, Rick Murphy: A Day in the Life of a Broker Dealer

[In this clip](#) from the panel webinar, *A Broker Dealer's Perspective on the Alts Market*, Rick Murphy (Executive VP for Berthel Fisher) explains what a day in the life of a broker dealer looks like.

[Click here](#) to view more videos.

VIP (640x100)

Altigo Adds 46 New Sponsors to the Platform in 2022

Altigo continues to add well-known asset managers to its industry-leading electronic subscription platform for alternative investments. In fact, 2022 has seen the most sponsors sign with Altigo in a single year-46 to date-with more waiting in the wings in the remainder of Q4.

[Read More](#)

Signature (300x250)

Inside the Vault...

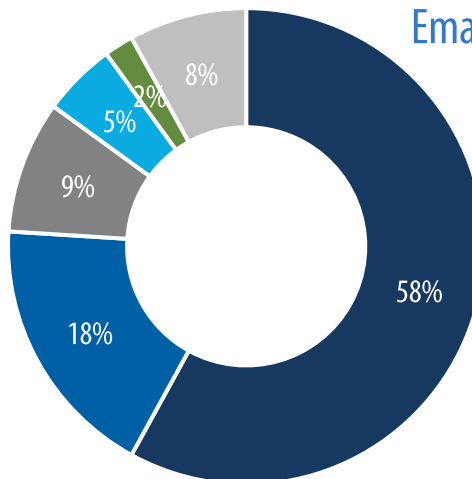
What was the weighted average interest rate on the \$128.3 billion total debt owed by all nontraded REITs as of June 30, 2022?

[Open the Vault](#)

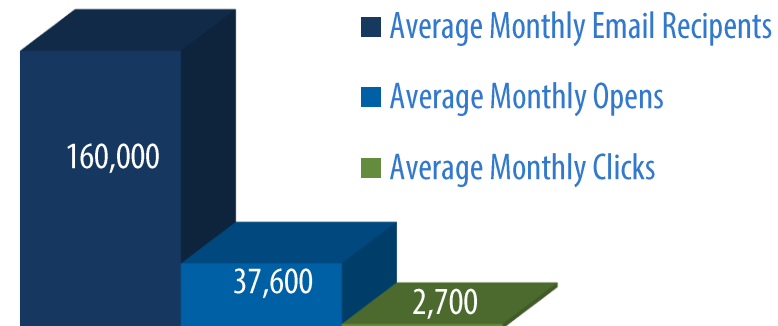
Email Ad Locations

5,800+ email subscribers

Email List Makeup



- Advisors
- Asset Managers/Sponsors/Distribution Firm
- Industry Associates
- Broker Dealers
- Real Estate
- Misc.



Elite

1 year \$25,000 | 6 months \$15,000 | 3 months \$10,000 | 1 month \$5,000

Website:

- Primary ad rotation placement in **Position 1** (970x90) in the following locations
 - › **Blue Vault Homepage**
 - › News posts
 - › Inside the Vault posts
 - › Blue Vault Announcements
 - › Blue Vault Insight Articles

Email: Ad rotation* placement in top location

VIP

1 year \$15,000 | 6 months \$10,000 | 3 months \$7,000 | 1 month \$4,000

Website:

- Primary ad rotation placement in **Position 2** on:
 - › Blue Vault Homepage (970x90)
 - › News posts (300 x 250)
 - › Inside the Vault posts (300 x 250)
 - › Blue Vault Announcements (300 x 250)
 - › Blue Vault Insight Articles (300 x 250)

Email: Ad rotation* placement in the secondary location

* Ads are not included in all email types. Vault Value emails exclusive to Elite.

Signature

1 year \$12,000 | 6 months \$7,000 | 3 months \$5,000 | 1 month \$3,000

Website: Primary Ad rotation placement in Position 3 (300 x 250) on the Blue Vault Homepage

Email: Ad rotation* placement in the tertiary location

* Ads are not included in all email types. Vault Value emails exclusive to Elite.

Webinar* Sponsorship

6 webinars \$20,000 | 1 webinar \$5,000

Live Event:

- One minute introduction with brief informational slide during the broadcast
- One minute during the close of the webinar
- Opportunity to offer a handout to attendees

Email: logo recognition in webinar promo emails

Other: logo recognition in all webinar ads and promotions

* Only Blue Vault webinars can be sponsored

Profile Page

1 Year \$5,000

Detailed Profile Page About Your Firm*

These pages include a brief description of your company, organization details (management team, contact information, links), and product information. Logo will be included on the appropriate industry Profile Page.

The screenshot shows a professional website layout for Ashford Securities. At the top, a blue navigation bar contains the 'BLUEVAULT' logo and several menu items: LEARN, NEWS, RESEARCH, INDUSTRY ACCESS, MEMBERSHIP, EVENTS, WHY BLUE VAULT, and CONTACT US. Below the navigation, a breadcrumb trail reads 'Home > Investment Mgr > Ashford Securities'. The main heading is 'Asset Manager Profile'. To the right of this heading is a banner with the Ashford logo and the tagline 'PURSUING GROWTH & INCOME THROUGH OUR DIFFERENTIATED ALTERNATIVE INVESTMENT SOLUTIONS'. The page is divided into two main columns. The left column is titled 'About Ashford Securities' and features the Ashford logo, a paragraph of text describing the firm as a managing broker/dealer and FINRA member, its parent company Ashford Inc. (AINC), and its focus on alternative investment products. It also lists the founding year (2019) and the website URL (www.ashfordsecurities.com). A 'Want to Learn More?' section includes a call to action: 'I'd like this asset manager to contact me.' and a 'CONTACT ME' button. The right column is titled 'Contact Info' and provides the firm's address (14185 Dallas Parkway, Suite 780, Dallas, Texas 75254) and phone number (1-888-490-4292). Below the 'About' section is a 'Management Team' section featuring eight headshots of team members, each with their name and title: C. Jay Steigerwald III (Chief Executive Officer), Carly Hoeler, CPA (SVP, Head of Business Development), Mark Q. Fuentes (SVP, Head of Operations), Josh Rubinger (SVP, Head of National Accounts), Peter Moore (SVP, Head of Compliance), Bruce Sumner (SVP, Principal Financial Officer), Ben Hilgers, CFP® (SVP, National Sales Manager), and Bart Malcom (SVP, Head of Due Diligence). A 'Links' section at the bottom of the management team area provides the URL: https://www.ashfordsecurities.com/. At the very bottom of the page, a blue bar contains the text 'Become a member to access our data and reports.' and a 'BECOME A MEMBER' button.

* Profile pages are slightly different for investment managers vs professional service firms.

Additional Options

Single Article Ads

\$1,000

One article, for the life of the article
Ad in position 2 on a specific article
– typically one referencing your
organization.

Profile Package

\$5,000

1 year Advertisement | 1 year Video

(This ad for your Investment Manager Profile page)

Ad placement (970x90) at the top of
the investment manager's
Investment Manager Profile page.

Ad Specs

Banner 970 x 90

Email Banner 640 x 100

Content Body
300 x 250

File Types

Submit High Resolution files in one of the following formats: .ai, .eps, .pdf, .gif, .png

File Size

Files larger than 5 MB can be sent via file shares such as DropBox, Box, One Drive, etc. Files less than 5 MB can be emailed directly.

Landing Page

All ad submissions must include the web address for the desired link for the ad.

Footnote:

** Email ad rotation will depend on the number of advertisers.*