

“Dynamic Investing”

A custom podcast series that empowers listeners to invest with confidence

Overview

With its commitment to long-term investment goals, T. Rowe Price has helped millions of customers achieve their financial dreams. What sets the company apart is its client-centered philosophy—encouraging customers to embrace a disciplined, active approach to their finances.

WP BrandStudio will bring this strength to life through an original podcast series that will boost brand awareness and favorability among *The Washington Post's* influential and affluent audience.

Note: Program elements and production timelines are subject to change based on spend level and mutually agreed-upon objectives, target launch dates and KPIs determined during campaign kick-off call.

Execution

A six-part podcast series will be distributed and promoted over a three month period, across the same platforms as *The Washington Post* editorial podcast programs.

Series will cover T. Rowe Price topics including:

- Protecting wealth
- Estate planning
- Minimizing taxes
- Current market events
- Charitable planning
- Impact of legislative changes
- Managing health care costs in retirement
- Savings strategies
- Social Security claiming strategies
- Withdrawal strategy principles
- Working during retirement

Podcast Approach

Employing the engaging, round-table interview format of non-branded podcasts such as *Planet Money* or *Freakonomics*, we'll investigate financial topics that the average person is thinking about but rarely finds the time to consider from all angles.

Examples of episode topics

- ***"The Accidental Millionaire"***: You've done everything right—invested wisely, contributed to your 401K, etc.—as a result, you're financially set. What's next?
- ***"Protecting Wealth for the World Traveler"***: How does someone coming to the US for the first time make sense of 401Ks, IRAs and saving for retirement?
- ***"Estate Planning 101"***: What if the family's finances and accounts have always been in one person's hands? How can his/ her knowledge be passed down or shared to reduce the burden and risk?

Each 20–25 minute episode is led by an experienced podcast moderator who directs and engages in a conversation among a T. Rowe Price expert, a third-party subject-area expert and a guest whose personal story illuminates the discussion.

Examples of potential moderators*

- Adam Davidson: host of *Surprisingly Awesome* and former host of *Planet Money*
- Jenn White: Host of *Making Oprah* and WBEZ anchor
- Sean Cole: *This American Life* producer and contributor

Examples of potential topic experts*:

- Stephan R. Leimberg, author of *The Tools & Techniques of Estate Planning*
- Sandy Baum, professor of *Economics* and coauthor of *College Board's Trends in Student Aid* and *Trends in College Pricing*
- David F Swensen, Yale University endowment fund manager and author of books on personal investment strategies

*Individuals have not been approached and are subject to approval and availability. We are happy to utilize TRP's recommendations for casting in-house experts or collaborate on ideas as needed

Episode Structure

1. Pre-roll: Brief messaging introduces T. Rowe Price as the sponsor of the podcast and directs listeners to where they can learn more online

2. Intro & individual story: Host introduces the episode's topic and encourages the first guest to share his/ her story

3. Mid-roll: Brief messaging serves as branding and segue

0:15 Pre-roll

7:00-10:00
Intro & Individual Story

0:30 Mid-roll

10:00-15:00
SME Roundtable
Discussion

0:15 Outro

4. SME roundtable discussion: Host moderates a discussion between the TRP expert and third-party expert, as they discuss the scenario at hand and offer strategies and tips

5. Outro: Brief messaging concludes the podcast, informs readers where they can learn more online and sets up the upcoming episode.

Promotion

- With each episode release, a **custom blog post** will be produced by WP BrandStudio in collaboration with T. Rowe Price to promote the content and generate momentum among the target audience
- Episode blog posts will be promoted via **native advertising promotion modules**, which appear alongside relevant editorial and editorial podcast content
- The podcast series will be promoted with **pre-roll ad placements** on related editorial podcasts, which will encourage listeners to download the series
- Podcasts will be promoted natively in *The Washington Post* editorial podcast page on iTunes
- Podcast promotional modules will be embedded natively within *The Washington Post* editorial podcast [landing page](#)

Note: Promotional strategy to be confirmed with media plan based on investment level



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Thank You