

Research and Events Calendar 2020

At NextWealth we help firms thrive amid disruption. We offer broad market expertise and a deep understanding of the financial advice market and retail investment distribution. We offer research, consultancy and thought leadership content. We also host events and organise bespoke events for our clients.

Most of our work is done on a bespoke basis. The following is a list of the market reports we will publish and the public events we will host in 2020.

	Market Reports	Events
January	Aegon Retirement Advice Report	
February	Adviser Tech Stack Report : From platforms to back office systems our report rates and reviews the tech advisers use to support their businesses	Fund Distribution Breakfast Club
March		NextWealth Live Conference Women in Platforms Networking Drinks, Edinburgh Head of Platform Proposition Roundtable
April	Cash Management: Giving credence to cash	
May	Platform Document Submission Standards	
June		Virtual Fund Distribution Breakfast Club
July/August	ESG Marketing and Distribution Intelligence Report	Virtual Fund Distribution Breakfast Club
September	Adviser Tech Stack Report: Update Adviser Business Benchmarking report with PFS	Fund Distribution Breakfast Club Head of Platform Proposition Roundtable
October	Discretionary Managed MPS Proposition Comparison	Women in Platforms Networking Drinks, London
November		
December	Shape of Flows	Fund Distribution Breakfast Club NextWealth Christmas Drinks

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