



Research and Events Calendar 2022

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 2022.

	Market Reports	Events
January	Paid-for-Research: Aegon Managing Lifetime Wealth: retirement planning in the UK	DFM Council
February	Adviser Tech Stack Series: Tech Enabled Advice Tech to manage a CIP Report & Event	
March	Paid-for-Research: Ascentric Centralised Retirement Propositions Tech to manage a CIP Report & Event	NextWealth Live 2022 Council for Fund Distribution
April	ESG Series: ESG Marketing and Distribution Intelligence Report Update	DFM Council
May	Adviser Tech Stack Series: Document Submission Update Platforms in the UK Report	Advice Tech Live
June	MPS Proposition Series: Quarterly Asset Update Segregated Mandates Report	Council for Fund Distribution DFM Council
July/August	Adviser Tech Stack Series: Adviser Reviews Report	Advice Tech Live
September	Adviser Market: Financial Adviser Business Benchmarking report with PFS	Council for Fund Distribution DFM Council
October	ESG Series: ESG Marketing and Distribution Intelligence Report	
November	Adviser Tech Stack Series: Whitelabellers Report MPS Proposition Series: Discretionary Managed MPS Proposition Comparison & Quarterly Asset Update	Advice Tech Live
December		Council for Fund Distribution DFM Council NextWealth Christmas Drinks

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