

## 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		DFM Council
February	Adviser Tech Stack Series: <u>Tech Enabled Advice</u> Paid-for-Research: <u>Aegon Managing Lifetime Wealth:</u> retirement planning in the UK	
March	Paid-for-Research: <u>Ascentric Centralised Retirement</u> <u>Propositions</u>	NextWealth Live 2022 Council for Fund Distribution
April	Sustainable Investing Tracker Series: Sustainable Investing Tracker Study Update	DFM Council
May	Tech to manage a CIP Report & Event	
June	Adviser Tech Stack Series: <u>Document Submission Update</u> MPS Proposition Series: <u>Quarterly Asset Update</u>	Council for Fund Distribution DFM Council
July	Adviser Tech Stack Series: Security report  Fluido Digital Integration and Wealth Management: technology gaps and solutions	
August	Adviser Tech Stack Series: Adviser Reviews Report  Platforms in the UK Report	
September	Adviser Market: Financial Adviser Business Benchmarking report with PFS	Council for Fund Distribution DFM Council
October	Sustainable Investing Tracker Series: Sustainable Investing Tracker Study Report	
November	Adviser Tech Stack Series: Whitelabellers Report	Advice Tech Live
December	MPS Proposition Series: <u>Discretionary Managed MPS</u> <u>Proposition Comparison &amp; Quarterly Asset Update</u>	Council for Fund Distribution DFM Council NextWealth Christmas Drinks

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