



Research and Events Calendar 2023

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 2023.

	Market Reports	Events
January	Adviser Tech Stack Series: Whitelabellers Report	
February	Paid-for-Research: Aegon Managing Lifetime Wealth: retirement planning in the UK	
March	Adviser Tech Stack Series: Tech Enabled Advice	NextWealth Live 2023 Council for Fund Distribution DFM Council Head of Platform Roundtable
April	Sustainable Investing Tracker Series: Sustainable Investing Tracker Study Update	
May		
June	Adviser Tech Stack Series: Document Submission Update	Council for Fund Distribution DFM Council
July	MPS Proposition Series: Quarterly Asset Update	
August		
September	Adviser Tech Stack Series: Adviser Reviews Report	Council for Fund Distribution DFM Council
October	Adviser Market: Financial Adviser Business Benchmarking report	
November	Adviser Tech Stack Series: Back Office Systems Report Platforms in the UK Report	Council for Fund Distribution
December	MPS Proposition Series: Discretionary Managed MPS Proposition Comparison & Quarterly Asset Update	DFM Council NextWealth Christmas Drinks

Sign up for our newsletter to keep up to date with our latest research and insights:
www.nextwealth.co.uk/#newsletter

