



## Research and Events Calendar 2024 & 2025

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 events we will host for the remainder of 2024 and 2025.

2024	Market Reports	Events
January	Paid-for-Research: <a href="#">Aegon Managing Lifetime Wealth: retirement planning in the UK</a>	Platforms Council
February	<a href="#">Future of Financial Advice</a>	DFM Council
March	Adviser Tech Stack Series: <a href="#">The Next Platform Shakeout Consolidators and Aggregators Report</a>	<b>NextWealth Live 2024</b> Council for Fund Distribution
April		Platforms Council
May	<a href="#">AI Index Report</a>	AI Lab
June	<a href="#">Multi-Asset Distribution Dynamics Report</a> MPS Proposition Series: <a href="#">Quarterly Asset Update</a> Adviser Tech Stack Series: Risk Profiling	Council for Fund Distribution DFM Council
July		Platforms Council
August		
September	Adviser Tech Stack Series: <a href="#">Adviser Reviews Report</a>	Council for Fund Distribution DFM Council AI Lab
October	Adviser Market: <a href="#">Financial Adviser Business Benchmarking report</a>	
November	Adviser Tech Stack Series: Hybrid Advice Report <a href="#">Platforms in the UK Report</a>	Council for Fund Distribution Adviser Roadshows
December	MPS Proposition Series: <a href="#">Discretionary Managed MPS Proposition Comparison &amp; Quarterly Asset Update</a>	DFM Council NextWealth Christmas Drinks



2025	Market Reports	Events
January	Platform Dynamics Report <small>NEW</small>	Platforms Council AI Lab
February	Adviser Tech Stack Series: Topic to be determined (past updates includes <a href="#">The Next Platform Shakeout</a> )  Fee Benchmarking <small>NEW</small>	DFM Council
March	<a href="#">Consolidators and Aggregators Report</a>	<b>NextWealth Live 2025</b> Council for Fund Distribution
April	<a href="#">NextWealth Live Report</a>	Platforms Council AI Lab
May	<a href="#">AI Index Report</a>	
June	MPS Proposition Series: <a href="#">Quarterly Asset Update</a> Adviser Tech Stack Series: Topic to be determined (past updates includes <a href="#">Risk Profiling</a> )	Council for Fund Distribution DFM Council AI Lab
July		Platforms Council
August		
September	Adviser Tech Stack Series: <a href="#">Adviser Reviews Report</a>	Council for Fund Distribution DFM Council AI Lab
October	Adviser Market: <a href="#">Financial Adviser Business Benchmarking report</a>	Platforms Council
November	Adviser Tech Stack Series: Topic to be determined  <a href="#">Platforms in the UK Report</a>	Council for Fund Distribution
December	MPS Proposition Series: <a href="#">Discretionary Managed MPS Proposition Comparison &amp; Quarterly Asset Update</a>	DFM Council NextWealth Christmas Drinks

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