

Research and Events Calendar 2024

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 in 2024.

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

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