

Research and Events Calendar 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 in 2025.

Market Reports		Events
January		Platforms Council AI Lab
February	Adviser Tech Stack Series: Update to The Next Platform Shakeout Platform Dynamics Report <small>NEW</small>	DFM Council
March	Fee Benchmarking <small>NEW</small> Consolidators and Aggregators Report	NextWealth Live 2025 Council for Fund Distribution
April	NextWealth Live Report	Platforms Council AI Lab
May	AI Index Report	
June	MPS Proposition Series: Quarterly Asset Update: Data Integrations Adviser Tech Stack Series: Data Integrations	Council for Fund Distribution DFM Council AI Lab
July	Smoothed Funds and Guaranteed Income report: <small>NEW</small>	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	Platforms Council
November	Adviser Tech Stack Series: Topic to be determined Segregated Mandates Report: <small>NEW</small>	Council for Fund Distribution
December	MPS Proposition Series: Discretionary Managed MPS Proposition Comparison & Quarterly Asset Update	DFM Council NextWealth Christmas Drinks

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