

2020 EDITORIAL CALENDAR

ISSUE DATE	CLOSE DATE	SPECIAL REPORT COVER STORIES	LISTS/RANKINGS	COLUMNS	CONFERENCES/EVENTS BONUS DESCRIPTIONS
01/06/20 (Launch of resized issue)	12/17/19	<ul style="list-style-type: none"> Cover: Investment Spotlight – Mohamed A. El-Erian IRA Alert 		<ul style="list-style-type: none"> On Retirement On Technology 	<ul style="list-style-type: none"> Ad Effectiveness Study
01/13/20	12/31/19	Adviser Fintech: AI		<ul style="list-style-type: none"> On Advice IRA Alert Diversity & Inclusion 	
01/20/20	01/07/20	Behavioral Finance		<ul style="list-style-type: none"> On Retirement On Technology 	
01/27/20	01/14/20	Top Independent Broker-Dealer Directory		<ul style="list-style-type: none"> On Advice Tax Planning 	<ul style="list-style-type: none"> Inside ETFs Conference, Jan 26-29, Hollywood, FL FSI OneVoice, Jan 27-29, San Diego, CA TD Ameritrade LINC, Jan. 29-31, Orlando
02/03/20	01/21/20	2020 Icons & Innovators	Advisers on the Move (Q4)	<ul style="list-style-type: none"> Behavioral Finance 	
02/10/20	01/28/20	Regulation BI implementation <ul style="list-style-type: none"> Roth Retirement Accounts Private Wealth Adviser report 		<ul style="list-style-type: none"> On Advice IRA Alert Financial Literacy 	<ul style="list-style-type: none"> Investments & Wealth Institute Investment Advisor Forum, Feb 13-14, New York, NY
02/17/20	02/04/20	ESG Greenwashing		<ul style="list-style-type: none"> On Retirement On Technology 	<ul style="list-style-type: none"> T3 Advisor Conference, Feb 17-20, San Diego InvestmentNews webcast “Tax Planning 2020,” Feb. 18.
02/24/20	02/11/20	Millennials and Investing <ul style="list-style-type: none"> International Investing College Planning 		<ul style="list-style-type: none"> On Technology Tax Planning 	

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03/02/20	02/18/20	Health-Care Planning		<ul style="list-style-type: none"> • On Retirement • On Advice 	<ul style="list-style-type: none"> • Lipper Awards, March 5, New York.
03/09/20	02/25/20	Exchange-traded Funds		<ul style="list-style-type: none"> • On Technology • IRA Alert 	
03/16/20	03/03/20	RIA Trends • 2020 Lipper Supplement		<ul style="list-style-type: none"> • On Retirement • On Advice 	<ul style="list-style-type: none"> • IRI Marketing Summit, (TBA)
03/23/20	03/10/20	Philanthropic Giving • Women in Investing • Fixed-income Investments		<ul style="list-style-type: none"> • On Technology • Tax Planning 	<ul style="list-style-type: none"> • ICI Mutual Funds and Investment Management Conference, Mar 22-25, Palm Desert, CA
03/30/20	03/17/20	COVID-19 Adviser Survival Guide		<ul style="list-style-type: none"> • On Retirement • On Advice 	
04/06/20	3/24/20	Top Independent Broker Dealer Rankings and Profiles	Largest IBDs ranked by revenue & number of advisers	<ul style="list-style-type: none"> • On Technology • IRA Alert • Diversity & Inclusion 	
04/13/20	03/31/20	Annuities		<ul style="list-style-type: none"> • On Retirement • On Advice • Financial Literacy 	
04/20/20	04/07/20	ESG Investing		<ul style="list-style-type: none"> • On Technology • Tax Planning 	
04/27/20	04/14/20	Best Places to Work for Financial Advisers	Best & Worst Performing Mutual (Q1)	<ul style="list-style-type: none"> • On Retirement • On Advice • Behavioral Finance 	

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05/04/20	04/21/20	Business Development Planning Guide		<ul style="list-style-type: none"> • On Retirement • On Technology • Fiduciary Corner 	
05/11/20	04/28/20	Retirement Income	Top-performing ETFs (Q1)	<ul style="list-style-type: none"> • On Retirement • On Advice • Fiduciary Corner 	• <i>InvestmentNews</i> VIRTUAL Women Adviser Summit, May 14
05/18/20	05/05/20	Recruiting		<ul style="list-style-type: none"> • On Technology • IRA Alert 	
05/25/20	05/12/20	Fintech: Cybersecurity	Advisers on the Move (Q1)	<ul style="list-style-type: none"> • On Retirement • On Advice • Tax Planning 	
06/01/20	05/19/20	<ul style="list-style-type: none"> • Regulation BI • Election Outlook • Private Wealth Adviser Report 		<ul style="list-style-type: none"> • On Technology • Behavioral Finance • IRA Alert 	
06/08/20	05/26/20	Top RIA Rankings & Profiles	<ul style="list-style-type: none"> • Largest RIA firms • Ranked by AUM 	<ul style="list-style-type: none"> • On Retirement • On Advice 	
06/15/20	06/02/20	<ul style="list-style-type: none"> • Behavioral Finance • Midyear Tax Planning 		<ul style="list-style-type: none"> • On Technology • IRA Alert 	• Ad Effectiveness Study
06/22/20	06/09/20	Midyear Fund Managers		<ul style="list-style-type: none"> • On Retirement • On Advice 	
06/29/20	06/16/20	40 Under 40		<ul style="list-style-type: none"> • On Technology • Tax Planning • Diversity & Inclusion 	

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07/06/20		No Issue			
07/13/20	06/30/20	Investing in Alternatives		<ul style="list-style-type: none"> • On Retirement • On Advice • IRA Alert 	
07/20/20		No Issue			
07/27/20	07/14/20	Mega RIAs focus	Best & Worst Performing Mutual Funds (Q2)	<ul style="list-style-type: none"> • On Technology • Tax Planning • Financial Literacy 	
08/03/20		No Issue			
08/10/20	07/28/20	Diversity & Inclusion Issue	Top-performing ETFs (Q2)	<ul style="list-style-type: none"> • On Retirement • On Advice • IRA Alert • Fiduciary Corner 	• Ad Effectiveness Study
08/17/20		No Issue			<ul style="list-style-type: none"> • <i>InvestmentNews</i> Retirement Income Summit, Aug 17-18, Chicago, IL • <i>InvestmentNews</i> Women Adviser Summit, Aug 19, Chicago, IL
08/24/20	08/11/20	Custody Focus	<ul style="list-style-type: none"> • Largest Clearing & Custodial Firms • Advisers on the Move (Q2) 	<ul style="list-style-type: none"> • On Technology • Behavioral Finance • Tax Planning 	<ul style="list-style-type: none"> • <i>InvestmentNews</i> Women Adviser Summit, Aug 25, Boston • <i>InvestmentNews</i> RPA Aggregator, Aug 24-25, New York • <i>InvestmentNews</i> RPA Broker-Dealer, Aug 25-26, New York
08/31/20	08/25/20	Trust and Estate Planning		<ul style="list-style-type: none"> • On Retirement • On Advice 	• IRI Marketing Summit (TBA)

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09/7/20		No Issue			
09/14/20	09/08/20	Election Preview (Presidential and Congressional)		<ul style="list-style-type: none"> • On Technology • IRA Alert 	<ul style="list-style-type: none"> • <i>InvestmentNews</i> Diversity & Inclusion Awards, Sept 15, New York • <i>InvestmentNews</i> RPA-Record Keeper, Sept 16-17, New York
09/21/20	09/08/20	Top Executive Profile		<ul style="list-style-type: none"> • On Retirement • On Advice 	<ul style="list-style-type: none"> • Invest in Others, Sept 24, Boston
09/28/20	09/15/20	ESG Impact Investing • Invest in Others Awards (Finalists & Winners)		<ul style="list-style-type: none"> • On Technology • Tax Planning 	
10/05/20	09/22/20	Retirement Plan Supplement		<ul style="list-style-type: none"> • On Retirement • On Advice 	<ul style="list-style-type: none"> • <i>InvestmentNews</i> Women Adviser Summit, Oct. 1, Denver
10/12/20	09/29/20	Fintech: TAMPs • Private Wealth Adviser report	TAMPs Directory	<ul style="list-style-type: none"> • IRA Alert • Behavioral Finance • Fiduciary Corner 	<ul style="list-style-type: none"> • <i>InvestmentNews</i> RPA CIO, Oct. 6-7, New York
10/19/20	10/06/20	Social Security/Medicare Retirement Plan Supplement		<ul style="list-style-type: none"> • On Retirement • On Technology • Diversity & Inclusion 	<ul style="list-style-type: none"> • NAPFA Fall Conference, Oct 21-24, Atlanta, GA • <i>InvestmentNews</i> Women Adviser Summit, Oct. 20, San Francisco
10/26/20	10/13/20	<i>InvestmentNews</i> Performance Study and Top Advisers Awards	Best & Worst Performing Mutual Funds (Q3)	<ul style="list-style-type: none"> • On Advice • Tax Planning 	<ul style="list-style-type: none"> • <i>InvestmentNews</i> Future of the Business, Oct 27, New York • FPA National Conference, Sept. 30 – Oct. 2, Phoenix

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11/02/20	10/20/20	<ul style="list-style-type: none"> Emerging-markets Investing Retirement Plan Adviser supplement 		<ul style="list-style-type: none"> On Retirement On Technology Financial Literacy 	
11/09/20	10/27/20	<ul style="list-style-type: none"> Election Results, Adviser Impact Strategies for Annuitization 	<ul style="list-style-type: none"> Advisors on the Move (Q3) 	<ul style="list-style-type: none"> On Advice IRA Alert Fiduciary Corner 	<ul style="list-style-type: none"> Schwab Impact, Nov. 10-13, Boston
11/16/20	11/03/20	Adviser Fintech	<ul style="list-style-type: none"> Top-performing ETFs (Q3) 	<ul style="list-style-type: none"> On Retirement On Technology 	<ul style="list-style-type: none"> <i>InvestmentNews</i> Women to Watch, Nov 16, New York <i>InvestmentNews</i> Women Adviser Summit, Nov. 17, New York <i>InvestmentNews</i> Innovation Awards, Nov 18, New York
11/23/20	11/10/20	Women's Issue		<ul style="list-style-type: none"> On Advice Fiduciary Corner Tax Planning 	
11/30/20	11/17/20	<ul style="list-style-type: none"> Innovation Issue Exchange-traded Funds 		<ul style="list-style-type: none"> On Retirement On Technology 	
12/07/20	11/24/20	<ul style="list-style-type: none"> Business Development Retirement Plan Adviser supplement 		<ul style="list-style-type: none"> On Advice Behavioral Finance IRA Alert 	<ul style="list-style-type: none"> Ad Effectiveness Study <i>InvestmentNews</i> ESG & Impact Investing Forum, Dec. 2-3, New York
12/14/20	12/01/20	Regional RIA Rankings	RIA Rankings	<ul style="list-style-type: none"> On Retirement On Technology 	<ul style="list-style-type: none"> <i>InvestmentNews</i> RPA Fintech, New York (TBA)
12/21/20	12/08/20			<ul style="list-style-type: none"> On Advice Tax Planning 	
12/28/20		No Issue			