

# InvestmentNews

## 2023 EDITORIAL CALENDAR

| Vol. 27  | #  | Cover                   | IN Depth                  | Research                               | Projects/<br>Contributors | Event<br>Coverage | Space<br>Close | Materials<br>Close |
|----------|----|-------------------------|---------------------------|--|---------------------------|-------------------|----------------|--------------------|
| 1/9/23   | 1  | 2023 Outlook            | Lobbying Groups           |  | Ed Slott                  |                   | 12/19/22       | 12/21/22           |
| 1/23/23  | 2  | REITs                   | AI                        | AOTM FY22/Numbers Game                 | Mary Beth Franklin        |                   | 1/9/23         | 1/11/23            |
| 2/6/23   | 3  | Alternatives            | DEI (Black History Month) | US Future Flows                        | Ed Slott                  |                   | 1/23/23        | 1/25/23            |
| 2/20/23  | 4  | Schwab                  | Cybersecurity and Apps    | Ad Study                               | Mary Beth Franklin        |                   | 2/6/23         | 2/8/23             |
| 3/6/23   | 5  | Tax Strategies          | Best Places to Work       |  | Ed Slott                  | RIS Lab           | 2/20/23        | 2/22/23            |
| 3/20/23  | 6  | Inflation Strategies    | ETFs                      |  | Mary Beth Franklin        |                   | 3/6/23         | 3/8/23             |
| 4/3/23   | 7  | ESG                     | Finlit                    |  | Ed Slott                  | RIA Lab           | 3/20/23        | 3/22/23            |
| 4/17/23  | 8  | DEI Awards              |                           |  | Mary Beth Franklin        |                   | 4/3/23         | 4/5/23             |
| 5/1/23   | 9  | Gensler Anniversary     | Top IBDs                  | Top IBDs/Ad Study                      | Ed Slott                  | RIS & WAS1        | 4/17/23        | 4/19/23            |
| 5/15/23  | 10 | Annuities               | Vivek Ramaswamy Q&A       | AOTMQ1/<br>Numbers Game                | Mary Beth Franklin        | DEI Awards        | 5/1/23         | 5/3/23             |
| 6/5/23   | 11 | 40 Under 40             |                           | Best Cities for Advisers <40           | Ed Slott                  |                   | 5/15/23        | 5/17/23            |
| 6/19/23  | 12 | DEI                     | Midyear Outlook           |  | MBF /Summer Reading       |                   | 6/5/23         | 6/7/23             |
| 7/10/23  | 13 | Crypto                  | Fintech                   |  | Ed Slott                  | 40U40             | 6/19/23        | 6/21/23            |
| 7/24/23  | 14 | Mega-RIAs               | Auto-IRAs                 | Top Fee-only RIA/Ad Study              | Mary Beth Franklin        |                   | 7/10/23        | 7/12/23            |
| 8/7/23   | 15 | Fee Models              | DEI                       | Top Hybrid RIA Rankings                | Ed Slott                  |                   | 7/24/23        | 7/26/23            |
| 8/21/23  | 16 | Reg/Leg                 | ESG                       | AOTMQ2/Numbers Game                    | Mary Beth Franklin        |                   | 8/7/23         | 8/9/23             |
| 9/11/23  | 17 | Icons and Innovators    | Long-term Healthcare      |  | Ed Slott                  |                   | 8/21/23        | 8/23/23            |
| 9/25/23  | 18 | DEI Alumni              | Reg/Leg                   |  | Mary Beth Franklin        |                   | 9/11/23        | 9/13/23            |
| 10/9/23  | 19 | TBD                     | Fintech                   |  | Ed Slott                  |                   | 9/25/23        | 9/27/23            |
| 10/23/23 | 20 | Women's Issue           | Women to Watch            | TBD: Women's Issue/Ad Study            | Mary Beth Franklin        |                   | 10/9/23        | 10/11/23           |
| 11/6/23  | 21 | Compensation & Staffing | Vanguard Model            | Adviser Benchmarking                   | Ed Slott                  |                   | 10/23/23       | 10/25/23           |
| 11/20/23 | 22 | Fintech                 | College Planning          | AOTMQ3/Numbers Game                    | Mary Beth Franklin        |                   | 11/6/23        | 11/8/23            |
| 12/4/23  | 23 | Charitable Giving       | TBD                       |  | Ed Slott                  |                   | 11/20/23       | 11/22/23           |
| 12/18/23 | 24 | Year in Review          | Fintech                   | RIA Regional Rankings/<br>Numbers Game | Mary Beth Franklin        |                   | 12/4/23        | 12/6/23            |