

## 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"> <li>Cover: Investment Spotlight – Mohamed A. El-Erian</li> <li>2020 Tax Strategy</li> </ul>		<ul style="list-style-type: none"> <li>On Retirement</li> <li>On Technology</li> </ul>	<ul style="list-style-type: none"> <li>Ad Effectiveness Study</li> </ul>
01/13/20	12/31/19	Adviser Fintech: AI		<ul style="list-style-type: none"> <li>On Advice</li> <li>IRA Alert</li> <li>Diversity &amp; Inclusion</li> </ul>	
01/20/20	01/07/20	Behavioral Finance		<ul style="list-style-type: none"> <li>On Retirement</li> <li>On Technology</li> <li>Financial Literacy</li> </ul>	
01/27/20	01/14/20	Top Independent Broker-Dealer Directory	Advisers on the Move (Q4)	<ul style="list-style-type: none"> <li>On Advice</li> <li>Tax Planning</li> </ul>	<ul style="list-style-type: none"> <li>Inside ETFs Conference, Jan 26-29, Hollywood, FL</li> <li>FSI OneVoice, Jan 27-29, San Diego, CA</li> <li>TD Ameritrade LINC, Jan. 29-31, Orlando</li> </ul>
02/03/20	01/21/20	2020 Icons & Innovators		<ul style="list-style-type: none"> <li>Behavioral Finance</li> </ul>	
02/10/20	01/28/20	<ul style="list-style-type: none"> <li>Roth Retirement Accounts</li> <li>Private Wealth Adviser report</li> </ul>		<ul style="list-style-type: none"> <li>On Advice</li> <li>IRA Alert</li> </ul>	<ul style="list-style-type: none"> <li>Investments &amp; Wealth Institute Investment Advisor Forum, Feb 13-14, New York, NY</li> </ul>
02/17/20	02/04/20			<ul style="list-style-type: none"> <li>On Retirement</li> <li>On Technology</li> </ul>	<ul style="list-style-type: none"> <li>T3 Advisor Conference, Feb 17-20, San Diego</li> </ul>
02/24/20	02/11/20	<ul style="list-style-type: none"> <li>International Investing</li> <li>College Planning</li> </ul>	Largest variable annuity providers	<ul style="list-style-type: none"> <li>On Advice</li> <li>Tax Planning</li> </ul>	

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03/02/20	02/18/20	Health-Care Planning		<ul style="list-style-type: none"> <li>• On Retirement</li> <li>• On Technology</li> </ul>	<ul style="list-style-type: none"> <li>• Lipper Awards</li> </ul>
03/09/20	02/25/20	Exchange-traded Funds		<ul style="list-style-type: none"> <li>• On Advice</li> <li>• IRA Alert</li> </ul>	<ul style="list-style-type: none"> <li>• <i>InvestmentNews</i> Women to Watch, March 12, New York</li> </ul>
03/16/20	03/03/20	RIA Trends		<ul style="list-style-type: none"> <li>• On Retirement</li> <li>• On Technology</li> </ul>	<ul style="list-style-type: none"> <li>• IRI Marketing Summit, (TBA)</li> <li>• <i>InvestmentNews</i> Women Adviser Summit, March 18, Huntington Beach, CA</li> </ul>
03/23/20	03/10/20	<ul style="list-style-type: none"> <li>• Women in Investing</li> <li>• Fixed-income Investments</li> </ul>		<ul style="list-style-type: none"> <li>• On Advice</li> <li>• Tax Planning</li> </ul>	<ul style="list-style-type: none"> <li>• ICI Mutual Funds and Investment Management Conference, Mar 22-25, Palm Desert, CA</li> <li>• <i>InvestmentNews</i> RPA Aggregator, March 25 - 26, New York</li> </ul>
03/30/20	03/17/20	<ul style="list-style-type: none"> <li>• Business Development Planning Guide</li> </ul>		<ul style="list-style-type: none"> <li>• On Retirement</li> <li>• On Technology</li> </ul>	
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"> <li>• On Advice</li> <li>• IRA Alert</li> <li>• Diversity &amp; Inclusion</li> </ul>	
04/13/20	03/31/20	Separately Managed Accounts	Best & Worst Performing Mutual Separately (Q1)	<ul style="list-style-type: none"> <li>• On Retirement</li> <li>• On Technology</li> <li>• Financial Literacy</li> </ul>	
04/20/20	04/07/20	ESG Investing	Investment Perspectives - ESG funds	<ul style="list-style-type: none"> <li>• On Advice</li> <li>• Tax Planning</li> </ul>	<ul style="list-style-type: none"> <li>• <i>InvestmentNews</i> Retirement Income Summit, Apr 20-21, Chicago, IL</li> <li>• <i>InvestmentNews</i> Women Adviser Summit, Apr 22, Chicago, IL</li> </ul>
04/27/20	04/14/20	Best Places to Work for Financial Advisers		<ul style="list-style-type: none"> <li>• On Retirement</li> <li>• On Technology</li> <li>• Behavioral Finance</li> </ul>	<ul style="list-style-type: none"> <li>• <i>InvestmentNews</i> Innovation Awards, Apr 30, New York</li> </ul>

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05/04/20	04/21/20	Game changer: Cancer		<ul style="list-style-type: none"> <li>• On Advice</li> <li>• Fiduciary Corner</li> </ul>	<ul style="list-style-type: none"> <li>• FPA Retreat, May 4-7, Cedar Creek, TX</li> <li>• NAPFA Spring Conference, May 6-9 Denver, CO</li> </ul>
05/11/20	04/28/20	<ul style="list-style-type: none"> <li>• Retirement Income &amp; Annuities</li> <li>• Retirement Plan Adviser Supplement</li> </ul>	Top-performing ETFs (Q1)	<ul style="list-style-type: none"> <li>• On Retirement</li> <li>• On Technology</li> <li>• Fiduciary Corner</li> </ul>	
05/18/20	05/05/20	Innovation Issue		<ul style="list-style-type: none"> <li>• On Advice</li> <li>• IRA Alert</li> </ul>	<ul style="list-style-type: none"> <li>• <i>InvestmentNews</i> RPA Broker-Dealer, May 19-20, New York</li> </ul>
05/25/20	05/12/20	Fintech: Cybersecurity	Advisers on the Move (Q1)	<ul style="list-style-type: none"> <li>• On Retirement</li> <li>• On Technology</li> <li>• Tax Planning</li> </ul>	<ul style="list-style-type: none"> <li>• Investments &amp; Wealth Institute, Annual Conference, May 27-30, Boston, MA</li> <li>• Peak Excell Conference, May 26-28, Las Vegas</li> </ul>
06/01/20	05/19/20	<ul style="list-style-type: none"> <li>• Election Outlook</li> <li>• Private Wealth Report</li> </ul>		<ul style="list-style-type: none"> <li>• On Advice</li> <li>• Behavioral Finance</li> <li>• IRA Alert</li> </ul>	<ul style="list-style-type: none"> <li>• Morningstar Investment Conference, Jun 3-5, Chicago</li> <li>• <i>InvestmentNews</i> Future of the Business, June 4, New York</li> </ul>
06/08/20	05/26/20	Top RIA Rankings & Profiles	<ul style="list-style-type: none"> <li>• Largest RIA firms</li> <li>• Ranked by AUM</li> </ul>	<ul style="list-style-type: none"> <li>• On Retirement</li> <li>• On Technology</li> </ul>	<ul style="list-style-type: none"> <li>• Pershing INSITE (TBA)</li> <li>• AICPA, Jun 9-13, Las Vegas, NV</li> </ul>
06/15/20	06/02/20	<ul style="list-style-type: none"> <li>• Midyear Tax Planning</li> </ul>		<ul style="list-style-type: none"> <li>• On Advice</li> <li>• IRA Alert</li> </ul>	<ul style="list-style-type: none"> <li>• Ad Effectiveness Study</li> </ul>
06/22/20	06/09/20			<ul style="list-style-type: none"> <li>• On Retirement</li> <li>• On Technology</li> </ul>	
06/29/20	06/16/20	<ul style="list-style-type: none"> <li>• 40 Under 40</li> <li>• Midyear Fund Manager Outlook</li> </ul>		<ul style="list-style-type: none"> <li>• On Advice</li> <li>• Tax Planning</li> </ul>	<ul style="list-style-type: none"> <li>• <i>InvestmentNews</i> Women Adviser Summit, June 30, Boston</li> </ul>

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07/06/20		No Issue			
07/13/20	06/30/20	Diversity & Inclusion Issue	Investment Perspectives - Alternatives	<ul style="list-style-type: none"> <li>• On Retirement</li> <li>• On Technology</li> <li>• IRA Alert</li> <li>• Diversity &amp; Inclusion</li> </ul>	
07/20/20		No Issue			
07/27/20	07/14/20	<ul style="list-style-type: none"> <li>• Mega RIAs focus</li> <li>• Retirement Plan Adviser supplement</li> </ul>	Best & Worst Performing Mutual Funds (Q2)	<ul style="list-style-type: none"> <li>• On Advice</li> <li>• Tax Planning</li> <li>• Financial Literacy</li> </ul>	
08/03/20		No Issue			
08/10/20	07/28/20		Top-performing ETFs (Q2)	<ul style="list-style-type: none"> <li>• On Retirement</li> <li>• On Technology</li> <li>• IRA Alert</li> <li>• Fiduciary Corner</li> </ul>	• Ad Effectiveness Study
08/17/20		No Issue			
08/24/20	08/11/20	Custody Focus	<ul style="list-style-type: none"> <li>• Largest Clearing &amp; Custodial Firms</li> <li>• Advisers on the Move (Q2)</li> </ul>	<ul style="list-style-type: none"> <li>• On Advice</li> <li>• Behavioral Finance</li> <li>• Tax Planning</li> </ul>	
08/31/20		No Issue			

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09/07/20	08/25/20	• Election Preview (Presidential and Congressional)		• On Retirement • On Technology	• IRI Marketing Summit (TBA)
09/14/20	09/08/20	Trust and Estate Planning	• Largest Life Insurance Companies • Largest LTC Carriers	• On Advice • IRA Alert	• <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		• On Retirement • On Technology	• Invest in Others, Sept 24, Boston
09/28/20	09/15/20	ESG Impact Investing		• On Advice • Tax Planning	
10/05/20	09/22/20	Invest in Others Awards (Finalists & Winners)		• On Retirement • On Technology	• <i>InvestmentNews</i> Women Adviser Summit, Oct. 1, Denver
10/12/20	09/29/20	• Fintech: TAMPs • Private Wealth Adviser report		• IRA Alert • Behavioral Finance • Fiduciary Corner	• <i>InvestmentNews</i> RPA CIO, Oct. 6-7, New York
10/19/20	10/06/20	Social Security/Medicare	• Best & Worst Performing Mutual Funds (Q3)	• On Retirement • On Technology • Diversity & Inclusion	• 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		• On Advice • Tax Planning	• FPA National Conference (TBA)

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11/02/20	10/20/20	<ul style="list-style-type: none"> <li>Emerging-markets Investing</li> <li>Retirement Plan Adviser supplement</li> </ul>		<ul style="list-style-type: none"> <li>On Retirement</li> <li>On Technology</li> <li>Financial Literacy</li> </ul>	
11/09/20	10/27/20	<ul style="list-style-type: none"> <li>Election Results, Adviser Impact</li> <li>Strategies for Annuitization</li> </ul>	<ul style="list-style-type: none"> <li>Advisors on the Move (Q3)</li> </ul>	<ul style="list-style-type: none"> <li>On Advice</li> <li>IRA Alert</li> <li>Fiduciary Corner</li> </ul>	
11/16/20	11/03/20	Adviser Fintech	<ul style="list-style-type: none"> <li>Top-performing ETFs (Q3)</li> </ul>	<ul style="list-style-type: none"> <li>On Retirement</li> <li>On Technology</li> </ul>	<ul style="list-style-type: none"> <li><i>InvestmentNews</i> Top Advisory Firm Summit, Chicago (TBD)</li> <li><i>InvestmentNews</i> Women Adviser Summit, New York (TBD)</li> </ul>
11/23/20	11/10/20	Women's Issue	<ul style="list-style-type: none"> <li>Investment Perspectives: Female Fund Managers</li> </ul>	<ul style="list-style-type: none"> <li>On Advice</li> <li>Fiduciary Corner</li> <li>Tax Planning</li> </ul>	<ul style="list-style-type: none"> <li><i>InvestmentNews</i> Future of Financial Advice, New York (TBD)</li> </ul>
11/30/20	11/17/20	Exchange-traded Funds		<ul style="list-style-type: none"> <li>On Retirement</li> <li>On Technology</li> </ul>	<ul style="list-style-type: none"> <li>Schwab IMPACT (TBA)</li> </ul>
12/07/20	11/24/20	<ul style="list-style-type: none"> <li>Business Development</li> <li>Retirement Plan Adviser supplement</li> </ul>		<ul style="list-style-type: none"> <li>On Advice</li> <li>Behavioral Finance</li> <li>IRA Alert</li> </ul>	<ul style="list-style-type: none"> <li>Ad Effectiveness Study</li> <li><i>InvestmentNews</i> ESG &amp; Impact Investing Forum, New York (TBD)</li> </ul>
12/14/20	12/01/20	Regional RIA Rankings		<ul style="list-style-type: none"> <li>On Retirement</li> <li>On Technology</li> </ul>	<ul style="list-style-type: none"> <li><i>InvestmentNews</i> RPA Fintech, New York (TBA)</li> </ul>
12/21/20	12/08/20	Outlook 2021		<ul style="list-style-type: none"> <li>On Advice</li> <li>Tax Planning</li> </ul>	
<b>12/28/20</b>		<b>No Issue</b>			