

# 2023 Investment Advisor Editorial Calendar

ISSUE	AD CLOSE	MATERIALS DUE	MAIN THEME	FEATURE	SPECIAL OPPORTUNITIES/ BONUS DISTRIBUTION**
February/March	01/03/2023	01/09/2023	The Retirement Issue 2023	A look at trends affecting Social Security and other important sources of retirement income, like annuities.	Bonus Distribution: Exchange - An ETF Experience
April/May	02/27/2023	03/06/2023	The Boutique Advisor	What advisors/firms targeting high-net-worth and ultra-high-net-worth investors are doing to stay ahead of the pack.	Bonus Distribution: Inside ETFs; Morningstar Investment Conference
June	05/01/2023	05/08/2023	The Wealth Management Issue 2023	Views on what broker-dealers, RIAs and other firm leaders see as the latest industry challenges and opportunities.	Bonus Distribution: BNY Mellon/Pershing INSITE; IMCA Annual Conf. Experience (ACE); Morningstar Investment Conference
July/August	06/05/2023	06/12/2023	Asset Management Excellence	A review of top investment managers in different asset categories	Bonus Distribution: FutureProof Advisor Circle
September	07/31/2023	08/07/2023	2023 ThinkAdvisor LUMINARIES - Part I*	The stories of award-winning individuals and firms in thought leadership, and diversity, equity & inclusion.	Baxter Ad Effectiveness Study; Bonus Distribution: 2023 LUMINARIES Awards
November	10/02/2023	10/09/2023	2023 ThinkAdvisor LUMINARIES - Part II*	The stories of award-winning individuals and firms in executive leadership and community impact.	Bonus Distribution: Money 20/20; Schwab IMPACT 2023; 2023 LUMINARIES Awards
December/January	10/30/2023	11/06/2023	Top Advisor News of 2023	Review of top industry developments and why they matter to advisors.	Bonus Distribution: FSI OneVoice 2024; FPA Annual Conference

THIS CALENDAR IS SUBJECT TO CHANGE AND IS FOR PLANNING PURPOSES ONLY. FOR THE MOST CURRENT INFORMATION, VISIT: <http://www.thinkadvisor.com/editorial-calendar/>

\*The focus of these two issues may change depending on the topic focus of the Luminaries Program in 2023

\*\* Conferences and live events will be evaluated on a case-by-case basis