

2021 Investment Advisor Editorial Calendar*

ISSUE	AD CLOSE	MATERIALS DUE	MAIN THEME	FEATURE	SPECIAL OPPORTUNITIES/ BONUS DISTRIBUTION**
Jan/Feb	12/29/2020	1/5/2021	Social Security	A look at trends affecting this important source of retirement income	Bonus Distribution: Inside ETFs, FSI OneVoice Annual Conference
March	1/26/2021	2/2/2021	Retirement Income: What's Working in 2021	Focus on innovations in retirement planning and investments	
April	2/23/2021	3/2/2021	Portfolio Perspectives	How asset managers are bringing new portfolio products and strategies to market to help advisors drive stronger results	Bonus Distribution: IMCA Annual Conf. Experience (ACE)
May	3/30/2021	4/6/2021	IA 25: Industry Influencers	Profiles of VIPs in the advisory space, including asset management, RIAs and other segments	Bonus Distribution: Morningstar Investment Conference
June	4/27/2021	5/4/2021	Presidents' Poll/Executive Suite Survey	Views on what broker-dealer/RIA leaders see as challenges & opportunities	Bonus Distribution: Pershing INSITE
July/August	6/1/2021	6/8/2021	Asset Management Excellence	Review of top investment managers in different asset categories	Baxter Ad Effectiveness Study
September	8/3/2021	8/10/2021	2020 Broker-Dealers of the Year	Interviews with leaders at the most successful brokerage firms	
October	8/31/2021	9/7/2021	Financial Planning: Thought Leaders	Profiles of top planners and reviews of their financial plans	
November	9/28/2021	10/5/2021	RIAs in Focus	Updates on innovation in fee-based advisory work from VIPs	Bonus Distribution: Schwab IMPACT
Dec/Jan	11/2/2021	11/9/2021	Top Advisor News of the Year	Review of top industry developments and why they matter to advisors	

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

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