

2017 EDITORIAL CALENDAR

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Editorial schedule is subject to change. Updated: September 25, 2017

ISSUE DATE	CLOSE DATE	SPECIAL REPORT COVER STORIES	LISTS/ RANKINGS	COLUMNS	CONFERENCES/ EVENTS BONUS DESCRIPTIONS
01/02/17	NO ISSUE			<ul style="list-style-type: none"> • IRA Alert • Tax Planning 	
01/09/17	12/27/16	Outlook 2017		<ul style="list-style-type: none"> • On Retirement • Ask the Ethicist 	
01/16/17	01/03/17	Technology - Cybersecurity	Q4 Advisers on the Move	<ul style="list-style-type: none"> • Fiduciary Corner 	
01/23/17	01/10/17	Top Independent Broker-Dealer Directory		<ul style="list-style-type: none"> • Insurance Insights • On Retirement 	AICPA Jan. 23-25, Rancho Palos Verdes, Calif. FSI OneVoice Jan. 23-25, San Francisco, Calif.
01/30/17	01/17/17			<ul style="list-style-type: none"> • IRA Alert • Tax Planning • Technology 	TD Ameritrade Feb. 1-3, San Diego, Calif.
02/06/17	01/24/17			<ul style="list-style-type: none"> • On Retirement 	IMCA Consultants Conference Feb. 9-10, NYC, NY
02/13/17	01/31/17			<ul style="list-style-type: none"> • Ask the Ethicist 	T3 Advisor Conference Feb. 14-17, Garden Grove, CA.
02/20/17	02/07/17		Largest Variable Annuity Providers	<ul style="list-style-type: none"> • Insurance Insights • On Retirement 	
02/27/17	02/14/17			<ul style="list-style-type: none"> • IRA Alert • Technology 	
03/06/17	02/21/17	Impact Investing		<ul style="list-style-type: none"> • Tax Planning • On Retirement 	InvestmentNews Women to Watch Mar. 8, NYC, NY
03/13/17	02/28/17			<ul style="list-style-type: none"> • Fiduciary Corner 	Ad Effectiveness Study ICI Mutual Funds/Investment Management Conference Mar. 12-15, Palm Springs, Fla.
03/20/17	03/07/17	Retirement Plan Adviser Quarterly Supplement		<ul style="list-style-type: none"> • Insurance Insights • On Retirement 	IRI Marketing Summit Mar. 19-21, Chicago, Ill. Thomson Reuters Lipper Fund Awards Mar. 23, NYC, New York
03/27/17	03/14/17			<ul style="list-style-type: none"> • IRA Alert • Ask the Ethicist • Technology 	

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04/03/17	03/21/17			<ul style="list-style-type: none"> • Tax Planning • On Retirement 	
04/10/17	03/28/17	DOL Fiduciary, One Year In and Implementation Date Hits Today		<ul style="list-style-type: none"> • Ask the Ethicist 	
04/17/17	04/04/17			<ul style="list-style-type: none"> • Insurance Insights • On Retirement 	
04/24/17	04/11/17	Top Independent Broker-Dealer Rankings and Profiles	Largest IBDS ranked by revenue, number of advisers	<ul style="list-style-type: none"> • IRA Alert • Technology 	InvestmentNews Retirement Income Summit Apr. 24-25, Chicago, Ill. FPA Retreat Apr. 24-27, Atlanta, Ga. InvestmentNews Women Advisor Summit Apr. 26, Chicago, Ill. Morningstar Investment Conference Apr. 26-28, Chicago, Ill.
05/01/17	04/18/17	Exchange-Traded Funds	<ul style="list-style-type: none"> • Top performing ETFs • Q1 Advisers on the Move 	<ul style="list-style-type: none"> • Tax Planning • On Retirement 	IMCA Annual Conference Apr. 30-May 3, San Diego, Calif. Envestnet Advisor Summit May 3-5, Grapevine, Texas
05/08/17	04/25/17			<ul style="list-style-type: none"> • Fiduciary Corner • Ask the Ethicist 	
05/15/17	05/02/17	Mutual Funds	Best and Worst Performing Mutual Funds	<ul style="list-style-type: none"> • On Retirement 	NAPFA Spring National Conference May 16-19, Bellevue, Wash.
05/22/17	05/09/17	Retirement Plan Adviser Quarterly Supplement		<ul style="list-style-type: none"> • IRA Alert • Insurance Insights • Technology 	
05/29/17	05/16/17	Retirement Income		<ul style="list-style-type: none"> • Tax Planning • On Retirement 	Peak Excell Spring Conference May 31-Jun. 2, Las Vegas, Nev.
06/05/17	05/23/17	Top RIA Rankings and Profiles	Largest RIA firms ranked by AUM	<ul style="list-style-type: none"> • Ask the Ethicist 	
06/12/17	05/30/17			<ul style="list-style-type: none"> • Insurance Insights • On Retirement 	Pershing INSITE June 14-16, San Diego, Calif.
06/19/17	06/06/17	40 Under 40		<ul style="list-style-type: none"> • IRA Alert • Technology 	Ad Effectiveness Study
06/26/17	06/13/17			<ul style="list-style-type: none"> • Tax Planning • On Retirement 	

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07/03/17	NO ISSUE				
07/10/17	06/27/17	Target Date Funds		<ul style="list-style-type: none"> • Fiduciary Corner • On Retirement • IRA Alert 	InvestmentNews Women Advisor Summit July 11, Boston, Mass.
07/17/17	NO ISSUE				
07/24/17	07/11/17	Women and Investing	Q2 Advisers on the Move	<ul style="list-style-type: none"> • On Retirement • Technology 	
07/31/17	NO ISSUE				
08/07/17	07/25/17	Custody and Clearing	<ul style="list-style-type: none"> • Largest Clearing Firms • Largest Custodians 	<ul style="list-style-type: none"> • Ask the Ethicist • On Retirement • Insurance Insights 	
08/14/17	NO ISSUE				
08/21/17	08/08/17	Emerging Markets		<ul style="list-style-type: none"> • On Retirement • Technology 	Ad Effectiveness Study
08/28/17	NO ISSUE				
09/04/17	08/22/17	Retirement Plan Adviser Quarterly Supplement		<ul style="list-style-type: none"> • Tax Planning • On Retirement 	Morningstar ETF Conference Sept. 6-8, Chicago, Ill.
09/11/17	08/29/17	College Planning Future of the Business	Largest 529 Plans	<ul style="list-style-type: none"> • Fiduciary Corner • Ask the Ethicist 	FSI Summit Sept. 10-12, Atlanta, GA.
09/18/17	09/05/17		<ul style="list-style-type: none"> • Largest Life Insurance Companies • Largest Long-Term-Care Carriers 	<ul style="list-style-type: none"> • Insurance Insights • On Retirement 	
09/25/17	09/12/17			<ul style="list-style-type: none"> • IRA Alert • Technology 	IRI Annual Conference Sept. 24-26, Palm Beach, Fla. Invest in Others Awards Gala Sept. 28, NYC, N.Y.

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10/02/17	09/19/17	Invest in Others Awards Finalists		<ul style="list-style-type: none"> • Tax Planning • On Retirement 	FPA National Conference Oct. 2-4, Nashville, Tenn.
10/09/17	09/26/17			<ul style="list-style-type: none"> • Fiduciary Corner • Ask the Ethicist 	Peak Excell Fall Conference Oct. 11-13, Omaha, Neb.
10/16/17	10/03/17	InvestmentNews Compensation and Staffing Study	Q3 Advisers on the Move	<ul style="list-style-type: none"> • On Retirement • Insurance Insights 	InvestmentNews Best Practices Oct. 17, Boston, Ma.
10/23/17	10/10/17			<ul style="list-style-type: none"> • IRA Alert • Technology 	
10/30/17	10/17/17	Tax and Estate Planning		<ul style="list-style-type: none"> • Tax Planning • On Retirement 	
11/06/17	10/24/17	Future of Wealth Management: Focus on Technology		<ul style="list-style-type: none"> • Fiduciary Corner • Insurance Insights 	Ad Effectiveness Study
11/13/17	10/31/17			<ul style="list-style-type: none"> • On Retirement 	Schwab IMPACT Nov. 14-17, Chicago, Ill.
11/20/17	11/07/17	Women to Watch		<ul style="list-style-type: none"> • IRA Alert • Ask the Ethicist • Technology 	
11/27/17	11/14/17	Retirement Plan Adviser Quarterly Supplement	Technology and Social Media at Independent Broker-Dealers	<ul style="list-style-type: none"> • Tax Planning • On Retirement 	
12/04/17	11/21/17				MarketCounsel Summit Dec. 3-7, Miami, Fla.
12/11/17	11/28/17	Regional RIAs	Largest RIAs ranked by region	<ul style="list-style-type: none"> • Insurance Insights • On Retirement 	Schwab IMPACT Post Conference Guide
12/18/17	12/05/17	Icons and Innovators		<ul style="list-style-type: none"> • IRA Alert • Technology 	
12/25/17	NO ISSUE				

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01/01/18	NO ISSUE				
01/08/18	12/26/17	Outlook on Investing 2018		<ul style="list-style-type: none"> • On Retirement • On Investments • Ask the Ethicist 	AICPA Jan. 8-10, Rancho Palos Verdes, CA
01/15/18	01/02/18	Latest in Adviser Fintech		<ul style="list-style-type: none"> • On Advice • Fiduciary Corner • Technology • Social Media Adviser 	IMCA Investment Advisor Forum Jan. 16-17, New York, NY
01/22/18	01/09/18	Top Independent Broker-Dealer Directory		<ul style="list-style-type: none"> • On Retirement • On Investments • Insurance Insights 	
01/29/18	01/16/18		4Q Advisers on the move	<ul style="list-style-type: none"> • On Advice • IRA Alert • Tax Planning 	<ul style="list-style-type: none"> • FSI OneVoice Jan. 29-31, Grapevine, TX • TD Ameritrade Jan. 31-Feb 2, Orlando, FL
02/05/18	01/23/18	ESG Investing		<ul style="list-style-type: none"> • On Retirement • On Investments • Ask the Ethicist 	• T3 Advisor Conference Feb. 6-9, Ft. Lauderdale, FL
02/12/18	01/30/18			<ul style="list-style-type: none"> • On Advice • Technology • Social Media Adviser 	
02/19/18	02/06/18		Largest Variable Annuity Providers	<ul style="list-style-type: none"> • On Retirement • On Investments • Insurance Insights 	
02/26/18	02/13/18	Best Places to Work for Financial Advisers		<ul style="list-style-type: none"> • On Advice • IRA Alert • Tax Planning 	
03/05/18	02/20/18	Exchange-Traded Funds		<ul style="list-style-type: none"> • On Retirement • On Investments • Ask the Ethicist 	
03/12/18	02/27/18			<ul style="list-style-type: none"> • On Advice • Fiduciary Corner • Technology • Social Media Adviser 	<ul style="list-style-type: none"> • Ad Effectiveness Study • IRI Marketing Summit Mar. 11-13, ChampionsGate, FL • InvestmentNews Women to Watch Mar. 13, NYC, NY
03/19/18	03/06/18	Retirement Plan Adviser Quarterly Supplement		<ul style="list-style-type: none"> • On Retirement • On Investments • Insurance Insights 	<ul style="list-style-type: none"> • ICI 2018 Mutual Funds and Investment Management Conference, Mar. 18-21, San Antonio, TX • Thomson Reuters Lipper Fund Awards (TBA)
03/26/18	03/13/18			<ul style="list-style-type: none"> • On Advice • IRA Alert 	

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04/02/18	03/20/18	Focus on Annuities		<ul style="list-style-type: none"> • On Retirement • On Investments • Tax Planning 	
04/09/18	03/27/18			<ul style="list-style-type: none"> • On Advice • Ask the Ethicist • Technology • Social Media Adviser 	
04/16/18	04/03/18			<ul style="list-style-type: none"> • On Retirement • On Investments • Insurance Insights 	
04/23/18	04/10/18	Top Independent Broker-Dealer Rankings and Profiles	Largest IBDs ranked by Revenue, Number of Advisers	<ul style="list-style-type: none"> • On Advice • IRA Alert 	FPA Retreat Apr. 23-26, Phoenix, AZ
04/30/18	04/18/18		1Q Best & Worst Performing Mutual Funds	<ul style="list-style-type: none"> • On Retirement • On Investments • Tax Planning 	<ul style="list-style-type: none"> • InvestmentNews Retirement Income Summit, Apr. 30-May 1, Chicago, IL • InvestmentNews Women Adviser Summit, May 2, Chicago, IL
05/07/18	04/24/18	Retirement Income	1Q Top Performing ETFs	<ul style="list-style-type: none"> • On Advice • Technology • Ask the Ethicist • Social Media Adviser 	IMCA Annual Conference May 6-9, Nashville, TN
05/14/18	05/01/18			<ul style="list-style-type: none"> • On Retirement • On Investments • Fiduciary Corner 	<ul style="list-style-type: none"> • Envestnet Advisor Summit May 16-18, New Orleans, LA • NAPFA Spring National Conference May 16-19, Phoenix, AZ
05/21/18	05/08/18	529 Plans College Planning	1Q Advisers on the Move	<ul style="list-style-type: none"> • On Advice • IRA Alert • Insurance Insights 	
05/28/18	05/15/18	Mutual Funds		<ul style="list-style-type: none"> • On Retirement • On Investments • Tax Planning 	Peak Excell Spring Conference May 30-Jun. 1, Las Vegas, NV
06/04/18	05/22/18	Retirement Plan Adviser Quarterly Supplement		<ul style="list-style-type: none"> • On Advice • Ask the Ethicist • Technology • Social Media Adviser 	Pershing INSITE Jun. 6-8, Orlando, FL
06/11/18	05/29/18	Top RIA Rankings and Profiles	Largest RIA firms ranked by AUM	<ul style="list-style-type: none"> • On Retirement • On Investments • Insurance Insights 	Morningstar Jun. 11-13, Chicago, IL
06/18/18	06/05/18	40 Under 40		<ul style="list-style-type: none"> • On Advice • IRA Alert 	Ad Effectiveness Study
06/25/18	06/12/18			<ul style="list-style-type: none"> • On Retirement • On Investments • Tax Planning 	

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07/02/18	NO ISSUE				
07/09/18	06/26/18			<ul style="list-style-type: none"> • On Advice • Technology • Fiduciary Corner • Social Media Adviser 	InvestmentNews Women Adviser Summit, Jul. 10, Boston, MA
07/16/18	NO ISSUE				
07/23/18	07/10/18	Women and Investing	<ul style="list-style-type: none"> • 2Q Best & Worst Performing Mutual Funds • Target-Date Funds Ranking 	<ul style="list-style-type: none"> • On Retirement • On Investments • IRA Alert 	
07/30/18	NO ISSUE				
08/06/18	07/24/18	International Investing/Emerging Markets	<ul style="list-style-type: none"> • 2Q Top Performing ETFs • 2Q Advisers on the Move 	<ul style="list-style-type: none"> • On Advice • Ask the Ethicist • Technology • Tax Planning • Social Media Adviser 	Ad Effectiveness Study
08/13/18	NO ISSUE				
08/20/18	08/07/18	Custody and Clearing	Largest Clearing Firms and Custodians	<ul style="list-style-type: none"> • On Retirement • On Investments • Insurance Insights 	
08/27/18	NO ISSUE				
09/03/18	08/21/18	<ul style="list-style-type: none"> • Financial Planning Schools • Retirement Plan Adviser Quarterly Supplement 	Directory of Top Financial Planning Schools	<ul style="list-style-type: none"> • On Advice • Tax Planning • Technology • Social Media Adviser 	
09/10/18	08/28/18	Exchange-Traded Funds		<ul style="list-style-type: none"> • On Retirement • On Investments • Fiduciary Corner 	InvestmentNews Women Adviser Summit, (Date TBD), Denver
09/18/18	09/04/18		Largest Life Insurance Companies, Largest Long-term Carriers	<ul style="list-style-type: none"> • On Advice • Ask the Ethicist • Insurance Insights 	
09/24/18	09/11/18			<ul style="list-style-type: none"> • On Retirement • On Investments • IRA Alert 	<ul style="list-style-type: none"> • IRI Annual Conference, Sept. 23-25, White Sulphur Springs, WV • FSI Forum, Sept. 24-26, Salt Lake City, Utah • Invest in Others Awards Gala Sept. 28, Boston, MA

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10/01/18	09/18/18	Invest in Others Awards Finalists and Winners		<ul style="list-style-type: none"> • On Advice • Tax Planning • Technology • Social Media Adviser 	
10/08/18	09/25/18			<ul style="list-style-type: none"> • On Retirement • On Investments 	
10/15/18	10/02/18			<ul style="list-style-type: none"> • On Advice • Insurance Insights • Ask the Ethicist 	<ul style="list-style-type: none"> • FPA National Conference Oct. 15-18, Philadelphia, PA • NAPFA Fall Conference Oct. 15-18, Philadelphia, PA
10/22/18	10/09/18	InvestmentNews' 2018 Financial Performance Study	• 3Q Best & Worst Performing Mutual Funds	<ul style="list-style-type: none"> • On Retirement • On Investments • IRA Alert 	InvestmentNews Best Practices (TBA)
10/29/18	10/16/18		<ul style="list-style-type: none"> • 3Q Top Performing ETFs • 3Q Advisers on the Move 	<ul style="list-style-type: none"> • On Advice • Tax Planning • Fiduciary Corner 	Schwab IMPACT Oct. 28-31, Washington, DC
11/05/18	10/23/18	Technology		<ul style="list-style-type: none"> • On Retirement • On Investments • Technology 	InvestmentNews Women Adviser Summit, (TBD)
11/12/18	10/30/18			<ul style="list-style-type: none"> • On Advice • Insurance Insights • Social Media Adviser 	Ad Effectiveness Study
11/19/18	11/06/18	Women to Watch		<ul style="list-style-type: none"> • On Retirement • On Investments • Ask the Ethicist 	
11/26/18	11/13/18	Mutual Funds		<ul style="list-style-type: none"> • On Advice • Tax Planning • IRA Alert 	Schwab IMPACT Post Conference Guide
12/03/18	11/20/18	Retirement Plan Adviser Quarterly Supplement		<ul style="list-style-type: none"> • On Retirement • On Investments • Insurance Insights 	MarketCounsel Summit Dec. 3-6, (location TBA)
12/10/18	11/27/18	Regional RIAs		<ul style="list-style-type: none"> • On Advice • Technology • Ask the Ethicist • Social Media Adviser 	
12/18/18	12/04/18	Icons and Innovators		<ul style="list-style-type: none"> • On Retirement • On Investments • IRA Alert 	
12/24/18	NO ISSUE				