2022 Publications & Events

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Client Newsletter	Client Newsletter	Client Newsletter	Client Newsletter	Client Newsletter	Client Newsletter	Client Newsletter	Client Newsletter	Client Newsletter	Client Newsletter	Client Newsletter	Client Newsletter
Quarterly Market Commentary			Quarterly Market Commentary			Quarterly Market Commentary			Quarterly Market Commentary		
		Investment Committee			Investment Committee			Investment Committee			Investment Committee
Quarterly Fund Screen	Portfolio Profiles		Quarterly Fund Screen			Quarterly Fund Screen			Quarterly Fund Screen		
	Annual Multi-Manager review	Quarterly Market Metrics & Risk Matrix	Governance Update		Quarterly Market Metrics & Risk Matrix			Quarterly Market Metrics & Risk Matrix	Governance Update		Quarterly Market Metrics & Risk Matrix
		Financial Planning Assumptions	Investment Process - Theory & Evidence		Investment Process - Philosophy				Platform Due Diligence - Finalytiq		
			Investment Process - Asset Class Analysis								
				Client Advisory Board	Client Event		Client Survey			Client Advisory Board	
Virtual client events, education & topical bulletins – regularly throughout the year.											

2022 Publications & Events

Notes:

- Governance Updates & Investment Process – A detailed review of the latest investment theory & evidence
- Portfolio profiles – Annual review of EWM portfolios returns for the preceding calendar year and update to expected returns
- Multi-manager review – Annual review of how EWM portfolios compare to other major wealth managers
- Quarterly Fund Screen – Quantitative fund screen prepared by the Investment Committee with Betafolio
- Quarterly Market Metrics – A review of nominal and real asset class returns
- Quarterly Risk Metrics – A review of investment and regulatory risk factors affecting investors and advisory firms

Key to highlight colours:

- Yellow – Client facing publications
- Blue – Investment Committee meeting
- Gold – Internal due diligence
- Grey – Client events