

2023 Publications & Events: January - June

	Jan	Feb	Mar	Apr	May	Jun
Client Facing Publications & Meetings	Client Newsletter	Client Newsletter	Client Newsletter	Client Newsletter	Client Newsletter	Client Newsletter
	Client progress meetings	Client progress meetings – year end tax planning	Client progress meetings – year end tax planning	Client progress meetings – year start tax planning	Client progress meetings – year start tax planning	Client progress meetings
Investment Committee Meetings			Investment Committee			Investment Committee
Office Refurbishment			Office refurb / North Wing fit out	Office refurb / North Wing fit out	Office refurb / North Wing fit out	
Regulatory Compliance			External Compliance Visit	Annual Regulatory Return		External Compliance Visit
Internal Due Diligence	Quarterly Fund Screen	Portfolio Profiles		Quarterly Fund Screen		
		Annual Multi-Manager review	Quarterly Market Metrics & Risk Matrix	Governance Update		Quarterly Market Metrics & Risk Matrix
			Financial Planning Assumptions	Investment Process - Theory & Evidence		Investment Process - Philosophy
				Investment Process - Asset Class Analysis		
Renewals			Chartered Financial Planning Firm renewal			
Client Events					Client Advisory Board	Client Event
Bulletins	Education & topical bulletins – ad-hoc throughout the year					

2023 Publications & Events: July - December

	Jul	Aug	Sep	Oct	Nov	Dec
Client Facing Publications & Meetings	Client Newsletter	Client Newsletter	Client Newsletter	Client Newsletter	Client Newsletter	Client Newsletter
	Client progress meetings	Client progress meetings	Client progress meetings	Client progress meetings	Client progress meetings	Client progress meetings
Investment Committee Meetings			Investment Committee			Investment Committee
Regulatory Compliance			External Compliance Visit	Half-yearly Regulatory Return	External Compliance Visit	
Internal Due Diligence	Quarterly Fund Screen			Quarterly Fund Screen		
			Quarterly Market Metrics & Risk Matrix	Governance Update		Quarterly Market Metrics & Risk Matrix
				Platform Due Diligence		
Renewals			Accredited Financial Planning Firm renewal	Professional Indemnity Insurance		
Client Events		Annual Client Survey			Client Advisory Board	
Bulletins	Education & topical bulletins – ad-hoc throughout the year					

2023 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 timeline
- 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