

2025 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
Annual Planning Meetings	Year End Tax Planning. CGT Harvesting, Pension & ISA Contributions	Year End Tax Planning. CGT Harvesting, Pension & ISA Contributions	Year Start Tax Planning. CGT Harvesting, Pension & ISA Contributions	Year Start Tax Planning. CGT Harvesting, Pension & ISA Contributions	Annual Planning Meetings	Annual Planning Meetings	Annual Planning Meetings	Annual Planning Meetings	Annual Planning Meetings	Annual Planning Meetings	Annual Planning Meetings
	Previous Year Client Survey Results	EWM Investment Committee Spring Budget Review		Client Advisory Board	EWM Investment Committee Client Event	Timeline Investment Committee	Annual Client Survey	EWM Investment Committee	Autumn Budget – Review, Planning & Client Communication	Client Advisory Board	EWM Investment Committee
Quarterly Fund Screen			Quarterly Fund Screen			Quarterly Fund Screen			Quarterly Fund Screen Investment Process - Philosophy		
Economic Outlook & Market Review		Financial Planning Assumptions Review	Quarterly Portfolio Commentary			Quarterly Portfolio Commentary			Quarterly Portfolio Commentary Platform Due Diligence		
		External Compliance Visit	Annual Regulatory Return	Previous Year Tax Reporting (platform client reports)	External Compliance Visit			External Compliance Visit Accredited Financial Planning Firm Renewal	Half-Yearly Regulatory Return Professional Indemnity Insurance	External Compliance Visit Chartered Financial Planning Firm Renewal	