



New Service!

The Mutual Fund Calendar

The most comprehensive listing of advisor-centered events anywhere.

Advisors' email inboxes are flooded with wholesaler event information, much of which goes unread. Other event information is widely dispersed across the internet and can be easy to miss. As a result, event data is unmanageable in its current form.

The Problem

In today's rapidly changing financial world, fund companies and financial service providers are competing harder than ever to get the attention of financial advisors. The result is that advisors are inundated with invitations to various events—portfolio manager presentations, industry webinars, and continuing education (CE) classes, for example—and these notifications come in all different forms: email, snail mail, or over the phone.

Financial advisors, who are already overwhelmed with information, need an easy way to track and filter event data that is directly relevant to them.

The Service

Now, for the first time, financial advisors can access a single, comprehensive database of upcoming industry events focused on the advisory market.

SDG's **Mutual Fund Calendar** is the only curated set of upcoming events in the mutual fund business. We provide detailed event data that includes:

- Presentations and webcasts from dozens of fund providers
- Top industry conferences
- An expanding list of wholesaler events
- Continuing Education (CE) opportunities
- Regional chapter events from associations such as the FPA, FSP, NAPFA, and others.

The Audience

- Financial advisors
- Registered Investment Advisors
- Financial planners
- Financial industry compliance professionals

Coverage

MFC's constantly growing database of upcoming events is the most comprehensive in the industry. For example, our coverage includes:

- Approximately 1,000 detailed events each quarter.
- Institutional events from 75% of the top 50 fund companies (US only at this time)

Provenance

The folks behind The Mutual Fund Calendar are the same folks who shaped Wall Street Horizon and Briefing.com.



The Mutual Fund Calendar

Key Benefits

- An easy way to see all upcoming events in one place
- Avoid missing key events, lectures, and information sessions which are important to you and your practice
- Make it easier for licensed professionals to find Continuing Education (CE) opportunities.
- Provide better client service through better knowledge of your industry.
- Restricted to Licensed Professionals only

Key Features

An aggregated calendar of upcoming events of particular interest to financial advisors.

- The ability to Sort and Filter by Interest
- Ability to create watchlists by interest, fund, or manager
- Updated daily.
- Delivered in machine-readable form (XML format)
- Data Fields Offered:
 - Conference/Event Name, Date, Venue, City, ST
 - Presentation Name, Date, Time, Local Time Zone
 - CE (Continuing Education) Credits flagged for approved presentations
 - Speaker's Name, Title, Company
 - Wholesaler Name, phone, email
 - Event URL

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Contact us today for more information.

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