Thinking Ahead Institute | 2025 Impact & Influence Review

Summary of key milestones and highlights

December 2025

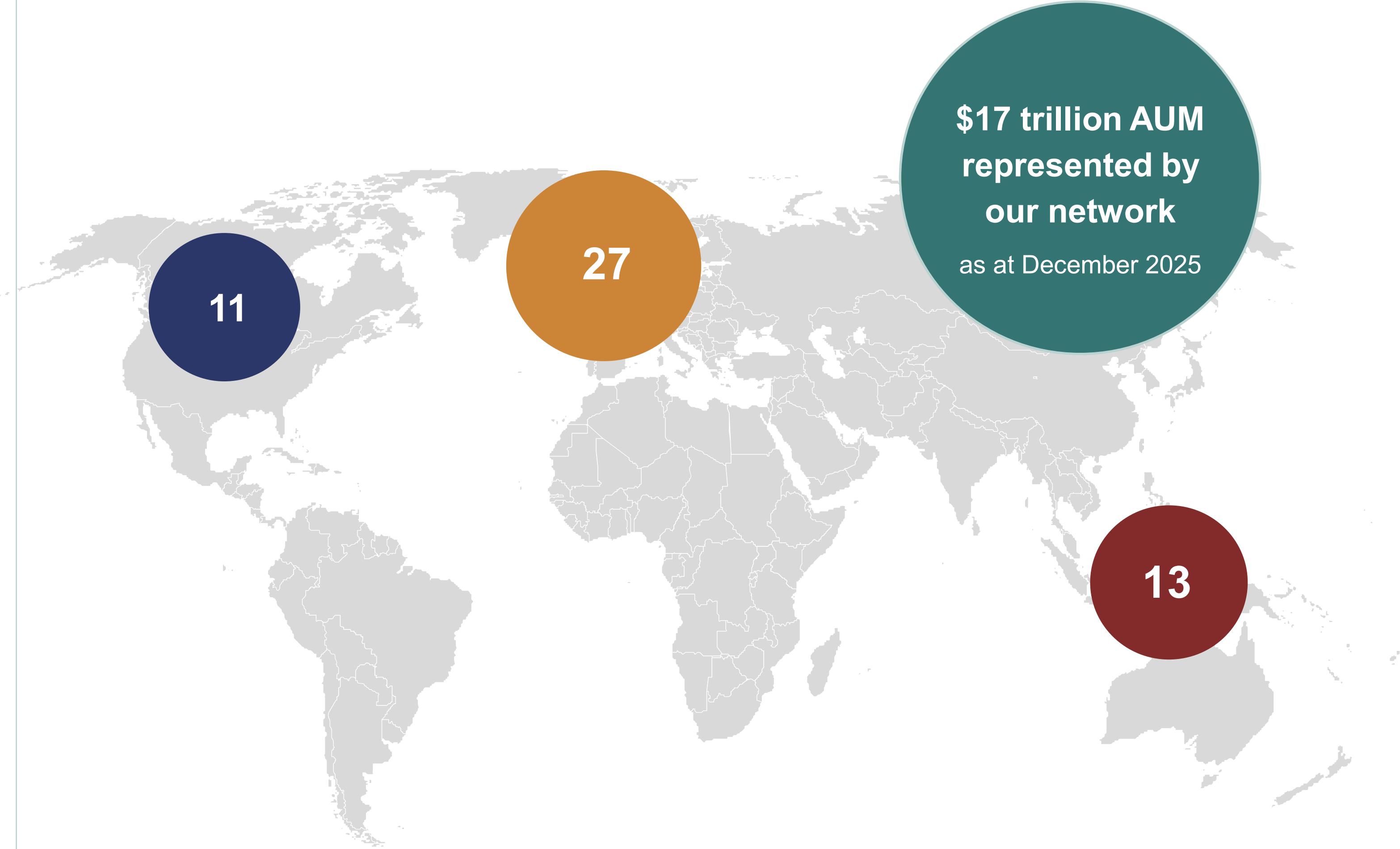
Thinking Ahead Institute
An innovation network founded by WTW

Who we are

We're a not-for-profit research and innovation network founded by WTW, delivering bold insights to help investors navigate the future.

In 10 years, we have collaborated with over 150 investment organisations to bring this vision to light. Our membership of **asset owners**, **asset managers**, **wealth providers** and **strategic partners** have the collective responsibility for over US$17 trillion worth of assets.

Watch our short video:



Number of members and partners per region

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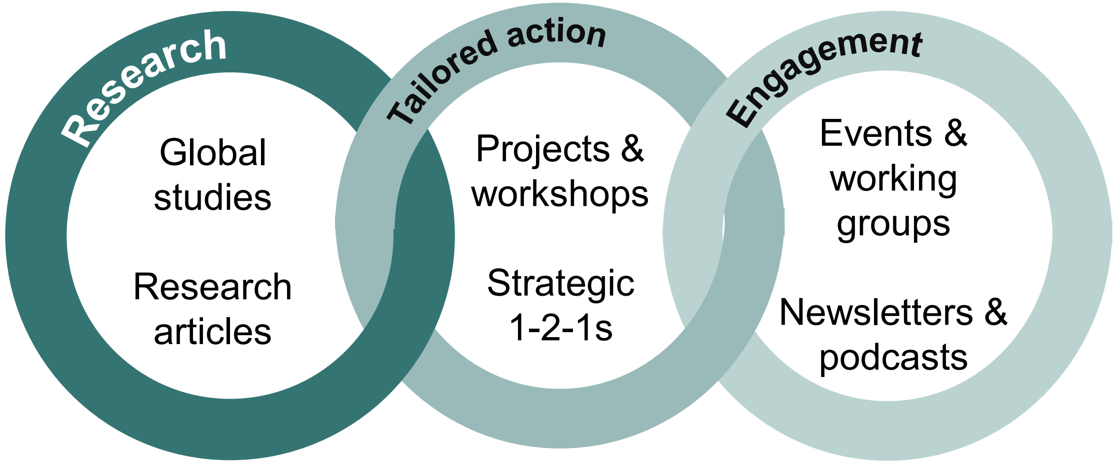
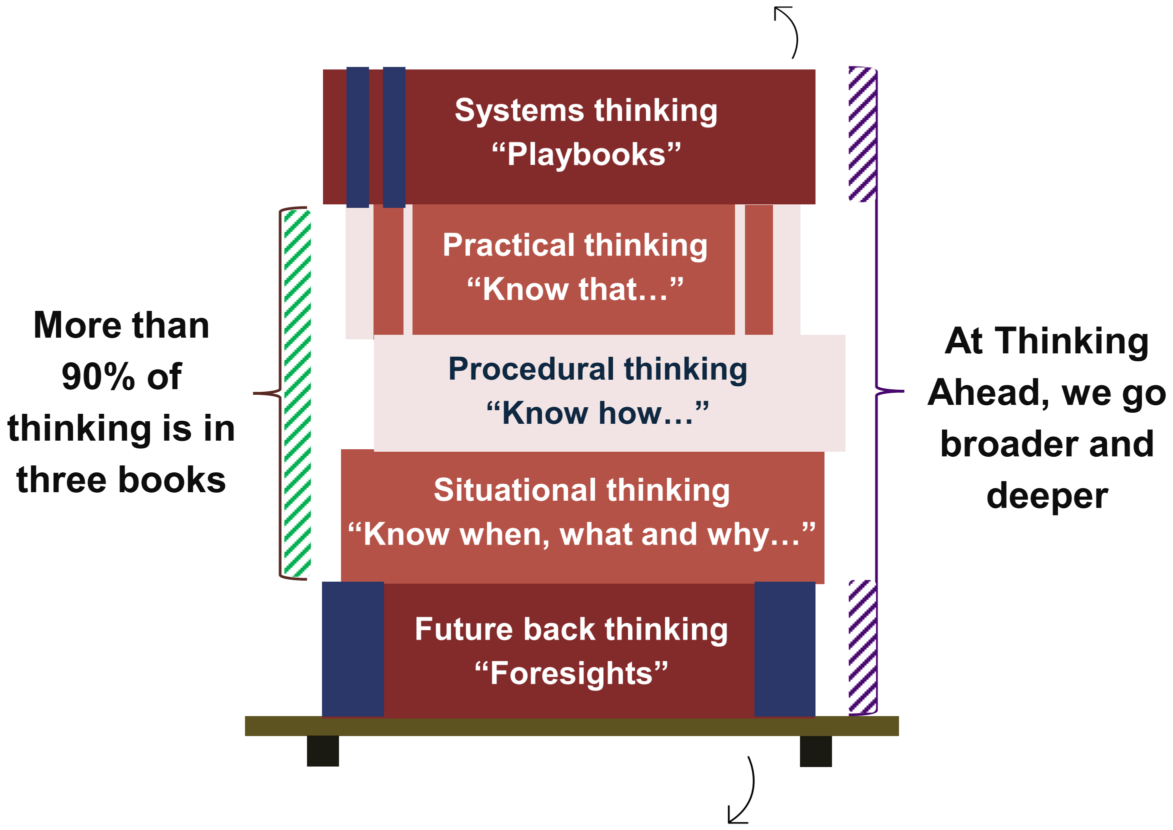
What we do and deliver

Our purpose is simple – to help investors navigate the future. How? We give them the foresight to build long-term value, realising our vision of influencing an investment industry that creates value for all.



We offer frameworks of thinking to solve problems

The ‘systems thinking’ book *zooms out* on the wider picture and its influences and opportunities to produce decision-useful playbooks



The ‘future back thinking’ book *zooms in* on issues happening over time and its impacts and threats to produce decision-useful foresights

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2025: in numbers

8
global studies and 20+ research papers & articles

10
projects with orgs from 7 countries

~940
media outlets featured our work

108
1-2-1 meetings and workshops

950+
people engaged through 21 global events

4
new members and partners joined us

30+
number of industry-leading voices we have worked with

5k+
LinkedIn followers - a 20% increase

Our research output

Published research, worldwide coverage

Global studies

- ✓ Global Wealth Study
- ✓ Global DC Peer Study
- ✓ Global Pension Assets Study
- ✓ Top 300 Pension Funds Study
- ✓ Asset Owner 100 Report
  (+ new section on private markets)
- ✓ Largest 500 asset managers
  (+ new section on AI/tech)
- ✓ Sustainability Peer Study

Global studies remain our most popular reports

Research papers & articles

Some examples:

- Tipping points and systemic risk
- The foundational thinking behind system-level investing
- Three-body problem in TPA
- Climate transition Working Group paper
- 7-part risk series
- Fresh snow | risk management for investment systems paper
- Two TPA papers: The TPA Story & The TPA Journey

20+ papers & articles

Visit our full **library of content**

Research featured in: FT FINANCIAL TIMES, REUTERS, top1000funds.com, The Times, Handelsblatt, European Pensions

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Case study: The Global Wealth Study 2025

The Global Wealth Study 2025 gathered the views of 250 global wealth management professionals via an extensive online survey conducted in July capturing more than 50,000 data points. The sample includes firms operating in the wealth space across 5 regions and 27 countries – each with at least $500 million in assets under management – including family offices, wealth managers, private and investment banks, wirehouses, independent financial advisers and broker/dealers.

Client engagement:

- 52 members and clients joined our Perspectives+: Global Wealth Study webinar
- Findings used during worldwide WTW MiX conferences and in ongoing work

Media:

INVESTMENT WEEK

thewealthnet trusted by leading wealth managers

WIN WEALTH INVESTMENT NEWS A leading resource for Wealth Professionals

A global view from 250 wealth leaders across 27 countries – exploring wealth, firms and portfolios.

Look at our report and dedicated page >

Collaboration:

335 WTW employees joined our two internal training sessions delivered by TAI & WTW wealth leaders

Investing for Tomorrow podcast

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Case study: Gaining momentum – Total portfolio approach (TPA)

Our research has received global recognition

Over the last year we have seen significant adoption and acceleration on TPA, with major funds like CalPERS adopting the approach. Our research is gaining influence—being applied, requested for events, and driving collaborations and projects. Here's a snapshot of the engagement we've seen this year:

Client engagement:

- Three projects on TPA from implementation to establishing a new governance framework
- Hosted **workshops** in **Zurich** and **Abu Dhabi**

Media:

FT FINANCIAL TIMES

FINANCIAL STANDARD

top1000funds.com

Total portfolio approach: goal-driven, best ideas for the whole fund, and dynamic allocation. It replaces siloed asset-class thinking, is driving a wider industry shift towards dynamic, whole-find decision-making.

TAI dedicated TPA hub >

Events we have spoken at:

AIMSE Europe

SimCorp

MSCI

Collaboration:

CAIA x TAI event

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Deliverables: engagement

Events

Our events provide a key platform for members and partners to connect, collaborate and exchange ideas. They showcase our research while gathering valuable insights from the community. This year, we hosted 21 events—from networking dinners to online discussions and live panels—bringing together leading organisations and senior industry voices. Including:

950+
attendees of our events

5
countries across four regions

Podcast

Now in its third year, **Investing for Tomorrow** offers a unique chance to listen to in-depth discussions with leading industry voices.

Organisations we've worked with:
- CalPERS
- NZ Super Fund
- Future Fund
- atomos
- L&G
- WTW
- World Gold Council
- USS
- BNY Mellon Newton
- PC30
- Apollo

9 podcasts covering:

- ✓ AI >
- ✓ Systemic risk >
- ✓ TPA >
- ✓ Wealth >
- ✓ DC >
- ✓ Alternatives & gold >
- ✓ Leadership >
- ✓ Organisational alpha >

2025: in pictures

BBC News interview


MSCI London Forum


MiX dinner, Chicago


MiX dinner, Madrid


MSCI Forum, Sacramento


AIMSE Europe Conference


Client workshop, Zurich

WTW MiX Conference


WTW Pensions Conference, Frankfurt


Network+, Sydney

CAIA x TAI event, London


Client workshop, Abu Dhabi

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What’s next?

Check out **our work**

Join our **Annual Briefing** – **Wednesday 4 February 2026**

Visit our **members portal**

Follow us on **LinkedIn** for the latest updates

Limitations of reliance and contact details

Limitations of reliance – Thinking Ahead Group 2.0

This document has been written by members of the Thinking Ahead Group 2.0. Their role is to identify and develop new investment thinking and opportunities not naturally covered under mainstream research. They seek to encourage new ways of seeing the investment environment in ways that add value to our clients.

The contents of individual documents are therefore more likely to be the opinions of the respective authors rather than representing the formal view of the firm.

Limitations of reliance – WTW

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