



# 2025 EVENTS BROCHURE







# Welcome

We are pleased to present Dimensional's program of conferences, webcasts, workshops, and other events as a major part of our Dimensional 360 offering.

Over the years, Dimensional has been privileged to work with a strong and growing community of exceptional clients, and our events program has always been a key part of helping connect financial professionals to Dimensional and each other.

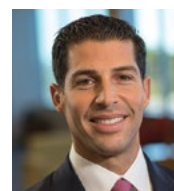
Every conference, workshop, and webcast we organize is designed around one or more of the following themes: investments, communication, and strategy. However, clients frequently tell us that it is the opportunity to network and share ideas with peers that elevates the experience beyond the purely educational nature of our events.

Held throughout the year and designed to enhance attendees understanding of relevant topics, these events provide exposure to a diverse lineup of experts and thought leaders.

We hope that providing this comprehensive schedule will enable you and others in your firm to identify the sessions that meet your individual needs. For more information or to request an invitation to an upcoming conference, workshop, or webcast, please contact your Dimensional representative.

We look forward to hosting you at an upcoming Dimensional live or virtual event in the near future.

Best regards,



**Bryce Skaff**  
Co-Head of Global  
Client Group



**Carlo Venes**  
Co-Head of Global  
Client Group



**Mark Gochmour**  
Head Of Global  
Client Services

# Dimensional Webcast Series

Dimensional offers live webcasts to keep advisors, institutional investors, financial professionals, and their clients informed on issues driving their investment approach and business strategy. The events feature Dimensional leaders and staff, prominent academics, and industry experts speaking on a range of topics, including the markets and economy, industry trends, practice management, current investment research, and Dimensional strategies.

The webcasts are offered through Dimensional 360, our holistic platform delivering a full spectrum of education and training for your business. The sessions are organized by series based on topic area and audience—and certain sessions offer CE credits for financial professionals. Many sessions are recorded for viewing through [my.dimensional.com](https://mydimensional.com).

Broadcast from Dimensional’s production studios, the webcasts offer a convenient avenue for enhancing your technical and professional knowledge and keeping your clients informed on issues impacting their wealth.

Register for upcoming events and view recorded webcasts at [my.dimensional.com/events](https://mydimensional.com/events).

|                                | INVESTMENTS | COMMUNICATION | STRATEGY |
|--------------------------------|-------------|---------------|----------|
| Dimensional Investing          | ✓           |               |          |
| Insights from a Thought Leader | ✓           |               | ✓        |
| Investor Experience            |             | ✓             | ✓        |
| Practice Management            |             |               | ✓        |
| Effective Communication        |             | ✓             | ✓        |
| Market Reviews                 | ✓           |               |          |



## Dimensional Investing

This series features Dimensional investment specialists offering a deeper perspective on investment performance, strategy implementation, and global markets. Past webcasts have featured Dimensional equity and fixed income ETFs, core bond strategies, inflation solutions, and new Dimensional strategies.

## Insights from a Thought Leader

Dimensional leaders and industry experts share their strategic perspectives on the economy, markets, and investing. The sessions help financial professionals stay informed on company and industry developments. Past sessions have included discussions on artificial intelligence, factor-based research, the global economy, central bank actions, market uncertainty, Fintech, and cryptocurrency.

## Investor Experience

Dimensional investment and client communications teams offer insights into current markets and long-term investing. The series is designed to help end-investors gain a deeper perspective on issues affecting their financial journey. Previous webcasts have offered insights on bond investing in the current market, elections and market performance, value vs. growth investing, market lessons from the pandemic, and sustainability investing.



## Practice Management

Dimensional's Practice Management and Global Client Group teams feature principles, strategies, and data-driven insights for advisory businesses. Informed by benchmarking and firm consulting experiences, the sessions highlight challenges and strategies in business growth. Past webcasts have covered the future of wealth management, using client feedback, website design, key performance indicators, and M&A strategies.

## Effective Communication

Dimensional's client service and communication teams offer insights and techniques to help advisors improve client understanding of markets and investing and enhance other aspects of communication. Sessions have included using the Matrix Book for client education, highlighting Dimensional resources that aid in client conversations, and implementing a decision-making framework for improving investor discipline.

## Market Reviews

Dimensional's investment and client communications teams review the global financial markets, Dimensional portfolio returns, and significant events during the period. These quarterly webcasts feature equity and fixed income market reviews for the US, developed, and emerging markets.

# Dimensional Conferences

Dimensional hosts a variety of events throughout the year, focusing on a diverse range of topics suitable for many different audiences.

Each building block within Dimensional’s conference program forms a comprehensive foundation—providing valuable insights into investment theory, strategy, and application, as well as the soft skills needed to build a successful business around these ideas.

The conference program is the cornerstone of Dimensional’s educational efforts, but it is not the whole story. We supplement these major events with smaller more targeted interactions— including webcasts, study groups, and tailored workshops.

For more information, or to request an invitation to a specific event, please contact your Dimensional representative.

*Dimensional Fund Advisors LP is an investment advisor registered with the Securities and Exchange Commission. This information is provided for registered investment advisors and institutional investors and is not intended for public use.*

*Please note dates may be subject to change.*

|                                    | INVESTMENTS | COMMUNICATION | STRATEGY |
|------------------------------------|-------------|---------------|----------|
| Foundations Conference             | ✓           | ✓             | ✓        |
| Applied Investments Conference     | ✓           |               |          |
| Applied Communications Workshop    |             | ✓             |          |
| Applied Business Strategy Workshop |             |               | ✓        |
| Deals and Succession Conference    |             |               | ✓        |
| Practice Management Symposium      |             |               | ✓        |
| Investor Symposium                 | ✓           |               |          |
| Specialty Conferences              | ✓           | ✓             | ✓        |



# Foundations Conference

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The Foundations Conference will focus on Dimensional's investment philosophy and investment approach to capital markets, while exploring multiple aspects of integrating Dimensional strategies into an advisory business. Topics include research and portfolio design, portfolio management and trading, and communicating Dimensional.

Attendees leave with a strong understanding of how Dimensional integrates financial science into their investment portfolios, and how Dimensional can support their overall investment offering, client communication, and business strategy.



# Applied Investments Conference

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The Applied Investments Conference explores investment-related themes in much greater detail while focusing on strategy implementation. Dimensional strategists and leaders throughout the firm speak on a diverse range of topics including in-depth discussions on how academic research should be applied to the investment process; review of Dimensional's portfolio design, management, and trading; and updates on investment research and market themes.

Attendees should have a foundational knowledge of Dimensional's investment philosophy prior to attending. This event is offered in a one day and one and half day format.



# Applied Communications Workshop

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The Applied Communications Workshop is designed to assist advisors in structuring a more effective communication strategy with clients and prospects. The sessions aim to provide advisors a framework that can be applied to a variety of conversations and questions, focusing on methods that resonate with different learning styles.

Attendees will walk away with an action plan to answer specific questions and objections regularly encountered by advisors.



# Applied Business Strategy Workshop

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The Applied Business Strategy Workshop helps attendees grow their advisory practice by taking a behavioral view of how they engage and close new business. Attendees will discuss and refine skills related to asking questions, talking about the competition, and articulating a compelling personal purpose for their business. The workshop breaks into small teams throughout the day to drive critical discussion and application of the concepts. The teams are led by experienced facilitators who are experts in their respective fields.

Attendees should leave with new language specific to their business, sharpened skills and disciplines, and the motivation to put their learning to work immediately.



# Investor Symposium

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The Investor Symposium features talks by Dimensional thought leaders and senior-level speakers. Presentations introduce key investment principles, describe Dimensional's investment process, and contrast a market-based approach to alternative management styles. The sessions also highlight the important role that advisors play during the investment journey.

Advisors may use the event to strengthen their relationships and build client/prospect confidence in Dimensional's way of investing. Audience interaction is encouraged.

*This event is intended for retail clients and their advisors.*



# Specialty Conferences

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Our Specialty Conferences offer a wide array of content from ESG investing, retirement planning, practice management topics, and more. These conferences provide attendees with the opportunity to hear and ask questions from subject matter experts in academia. Specialty conference content will showcase timely insights and an in-depth learning opportunity of Dimensional's investment approaches. These unique events happen annually both in our offices and virtually.



# Deals and Succession Conference

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The Deals and Succession Conference focuses on understanding the current M&A landscape, tangible ways to create or enhance your own strategy, and best practices around key initiatives, such as internal succession planning and ownership expansion. Dimensional's Practice Management team shares benchmarking insights and perspectives on M&A and hosts industry experts who discuss how advisory firms can best position for a purchase, merger, or sale.

Participants will have opportunities to connect with like-minded leaders from other firms and engage in small-group settings to exchange ideas and discuss managing deals and succession.



# Practice Management Symposium

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The Practice Management Symposium explores a plethora of topics surrounding how to manage and grow your business. You'll hear from Dimensional leaders as well as industry experts and practitioners. Informed by data from Dimensional's Global Advisor and Global Investor Studies, as well as outside industry trends, the sessions cover a wide range of practice management topics including business development, client and employee experience, and operational efficiency.

Dimensional US Events

Please note dates may be subject to change.

| DATE  | EVENT                           | LOCATION        | CE AVAILABLE |
|---|---------------------------------|-----------------|--------------|
| Jan 29  | Foundations Conference          | Santa Monica    | *            |
| Jan 30  | Applied Communications Workshop | Santa Monica    |              |
| Feb 5   | Foundations Conference          | Houston         | *            |
| Feb 12  | Foundations Conference          | Charlotte       | *            |
| Feb 13  | Applied Communications Workshop | Charlotte       |              |
| Feb 26-27   | Applied Investments Conference  | Austin          | *            |
| Mar 5-6   | Deals & Succession Conference   | Charlotte       |              |
| Mar 12  | Foundations Conference          | Virtual         | *            |
| Mar 13  | Investor Symposium              | Virtual         |              |
| Apr 2-3   | Annual Institutional Symposium  | Austin          |              |
| Apr 22  | Foundations Conference          | Fort Lauderdale | *            |
| Apr 23  | Applied Investments Conference  | Atlanta         | *            |
| Apr 24  | Applied Communications Workshop | Atlanta         |              |
| Apr 29  | Foundations Conference          | Austin          | *            |
| Apr 30  | Applied Communications Workshop | Austin          |              |
| Please note CE available conferences are subject to change. |                                 |                 |              |

| DATE  | EVENT                              | LOCATION       | CE AVAILABLE |
|---|------------------------------------|----------------|--------------|
| May 1   | Applied Business Strategy Workshop | Austin         |              |
| May 6-7   | Investor Symposium                 | Austin         |              |
| May 13  | Applied Communications Workshop    | Minneapolis    |              |
| May 14  | Applied Communications Workshop    | Ann Arbor      |              |
| May 15  | Foundations Conference             | Cleveland      | *            |
| Jun 11-12   | Applied Investments Conference     | Charlotte      | *            |
| Jun 24  | Foundations Conference             | Oklahoma City  | *            |
| Jun 25  | Applied Communications Workshop    | Denver         |              |
| Jun 26  | Applied Communications Workshop    | Salt Lake City |              |
| July 2  | Foundations Conference             | Virtual        | *            |
| July 16   | Foundations Conference             | Santa Monica   | *            |
| July 17   | Applied Communications Workshop    | Santa Monica   |              |
| July 22   | Foundations Conference             | Chicago        | *            |
| July 23   | Applied Communications Workshop    | Chicago        |              |
| July 24   | Applied Business Strategy Workshop | Chicago        |              |
| July 25   | Investor Symposium                 | Chicago        |              |
| Please note CE available conferences are subject to change. |                                    |                |              |



Dimensional US Events

Please note dates may be subject to change.

| DATE      | EVENT                              | LOCATION      | CE AVAILABLE |
|-----------|------------------------------------|---------------|--------------|
| Aug 5     | Applied Investments Conference     | San Francisco | *            |
| Aug 6     | Applied Communications Workshop    | San Francisco |              |
| Aug 7     | Applied Communications Workshop    | Seattle       |              |
| Aug 26    | Foundations Conference             | Charlotte     | *            |
| Aug 27    | Applied Communications Workshop    | Charlotte     |              |
| Aug 28    | Applied Business Strategy Workshop | Charlotte     |              |
| Sep 3     | Foundations Conference             | Virtual       |              |
| Sep 4     | Investor Symposium                 | Virtual       |              |
| Oct 7     | Foundations Conference             | Boston        | *            |
| Oct 8     | Applied Communications Workshop    | Boston        |              |
| Oct 9     | Applied Communications Workshop    | New York City |              |
| Oct 29-30 | Practice Management Symposium      | Austin        |              |

Please note CE available conferences are subject to change.

| DATE      | EVENT                              | LOCATION     | CE AVAILABLE |
|-----------|------------------------------------|--------------|--------------|
| Nov 4     | Foundations Conference             | Austin       | *            |
| Nov 4     | Foundations Conference             | Raleigh      | *            |
| Nov 5     | Applied Communications Workshop    | Austin       |              |
| Nov 11-12 | Applied Investments Conference     | Santa Monica | *            |
| Nov 13    | Applied Business Strategy Workshop | Santa Monica |              |
| Dec 3     | Applied Investments Conference     | St. Louis    | *            |
| Dec 4     | Applied Communications Workshop    | St. Louis    |              |
| Dec 10    | Foundations Conference             | San Diego    | *            |
| Dec 11    | Foundations Conference             | Virtual      | *            |

Please note CE available conferences are subject to change.