



2026 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 D. Skaff



Bryce Skaff
Co-Head of Global
Client Group

Carlo Venes



Carlo Venes
Co-Head of Global
Client Group

Mark R. Gochmour



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.

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.

	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		✓	
Deals and Succession Conference			✓
Practice Management Symposium			✓
Annual Institutional Symposium	✓	✓	
Investor Symposium	✓		
Specialty Conferences	✓	✓	✓
Lunch & Learns	✓		

Foundations Conference

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

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

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.



Communications Masterclass

The Communications Masterclass is a deep dive into structuring impactful investment conversations between advisors and their clients and prospects. Content will move beyond the basics of communication frameworks leading to deeper discussion, exploration, and application of nuanced approaches across a wide range of client interactions. This day-and-a-half event will equip attendees with practical tools to elevate their client communication.

Attendees should be familiar with and/or have previously attended an Applied Communications Workshop.

Investor Symposium

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.



Lunch & Learns

Lunch & Learns are designed as compact, pop-in sessions for financial professionals to gain timely insights on key investment themes, with opportunities to explore different strategies and solutions available for client portfolios. These interactive settings offer a chance to connect with Dimensional speakers and peers to exchange perspectives, and attendees will walk away with actionable items and important updates.

Specialty Conferences

Our Specialty Conferences offer a wide array of content from institutional investing, 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.



Annual Institutional Symposium

The Annual Institutional Symposium is our largest institutional event of the year, designed to bring together institutional investment professionals from around the world to share their thoughts and ideas. Attendees will hear the latest thinking from leading academics, industry experts, and Dimensional leaders on a range of topics from the economy and markets to the latest academic research in finance and more.

Deals and Succession Conference

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

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 27	Foundations Conference	Jacksonville	*
Jan 28	Lunch & Learn	Tampa	*
Jan 29	Lunch & Learn	Miami	*
Feb 4	Foundations Conference	Charlotte	*
Feb 5	Applied Communications Workshop	Charlotte	
Feb 11–12	Applied Investments Conference	Austin	*
Feb 18	Virtual Foundations Conference	Virtual	*
Feb 18	Foundations Conference	Dallas	*
Feb 19	Virtual Investor Symposium	Virtual	
Feb 24	Foundations Conference	Scottsdale	*
Feb 25	Applied Communications Workshop	Scottsdale	
Feb 26	Investor Symposium	Scottsdale	
Mar 4–5	Deals & Succession Conference	Charlotte	
Mar 10	Foundations Conference	Orange County	*
Mar 12	Foundations Conference	Bay Area	*
Mar 24	Foundations Conference	Philadelphia	*
Mar 25	Foundations Conference	Washington, DC	*
Mar 26	Applied Communications Workshop	Washington, DC	
Please note CE available conferences are subject to change.			

DATE	EVENT	LOCATION	CE AVAILABLE
Apr 8	Foundations Conference	Austin	*
Apr 9	Applied Communications Workshop	Austin	
Apr 22–23	Annual Institutional Symposium	Austin	
May 6	Lunch & Learn	Atlanta	*
May 7	Lunch & Learn	Charleston	*
May 13	Lunch & Learn	Des Moines	*
May 14	Lunch & Learn	Kansas City	*
May 20–21	Investor Symposium	Austin	
May 27	Virtual Foundations Conference	Virtual	*
Jun 10	Applied Investments Conference	Minneapolis	*
Jun 11	Applied Investments Conference	Denver	*
Jun 24–25	Applied Investments Conference	Charlotte	*
Please note CE available conferences are subject to change.			

Dimensional US Events

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DATE	EVENT	LOCATION	CE AVAILABLE
Jul 8	Foundations Conference	Santa Monica	*
Jul 9	Applied Communications Workshop	Santa Monica	
Jul 15	Lunch & Learn	Cincinnati	*
Jul 16	Lunch & Learn	Nashville	*
Jul 28	Foundations Conference	Chicago	*
Jul 29	Applied Investments Conference	Chicago	*
Jul 30–31	Communications Masterclass	Chicago	
Aug 4	Foundations Conference	Boise	*
Aug 5	Foundations Conference	Salt Lake City	*
Aug 6	Lunch & Learn	Las Vegas	*
Aug 12	Lunch & Learn	Portland	*
Aug 13	Applied Investments Conference	Seattle	*
Aug 26	Foundations Conference	Charlotte	*
Aug 27	Applied Communications Workshop	Charlotte	
Sep 2–3	Applied Investments Conference	Santa Monica	*
Sep 9	Virtual Foundations Conference	Virtual	*
Sep 10	Virtual Investor Symposium	Virtual	
Please note CE available conferences are subject to change.			

DATE	EVENT	LOCATION	CE AVAILABLE
Oct 6	Applied Investments Conference	Boston	*
Oct 7	Applied Investments Conference	New York	*
Oct 8	Lunch & Learn	New York	*
Oct 13	Foundations Conference	Milwaukee	*
Oct 14	Foundations Conference	Ann Arbor	*
Oct 15	Foundations Conference	St. Louis	*
Oct 21–22	Practice Management Symposium	Charlotte	
Nov 11	Foundations Conference	Austin	*
Nov 12	Applied Communications Workshop	Austin	
Dec 2	Foundations Conference	Santa Monica	*
Dec 3	Applied Communications Workshop	Santa Monica	
Dec 9	Virtual Foundations Conference	Virtual	*
Please note CE available conferences are subject to change.			

2026 Dimensional US Events

Ann Arbor

Atlanta

Austin

Bay Area

Boise

Boston

Charleston

Charlotte

Chicago

Cincinnati

Dallas

Denver

Des Moines

Jacksonville

Kansas City

Las Vegas

Miami

Milwaukee

Minneapolis

Nashville

New York

Orange County

Philadelphia

Portland

Salt Lake City

Santa Monica

Scottsdale

Seattle

St. Louis

Tampa

Washington, DC

