

# Global Practice Management at Dimensional

With more than a decade of insights collected from Dimensional's advisor community, our Practice Management team offers tools, expertise, and consulting to help you strategically manage and grow your business. To learn more, please contact your Dimensional representative or visit us at [dimensional.com](https://dimensional.com).

## Tools and Resources

### PODCAST

This series provides you with insights on best practices in key areas, including strategic growth, business efficiency, and the client experience.



### PRACTICE POINTS

These briefs and videos explore key topics across a broad range of practice management categories to help improve your firm's business strategy.



### CONFERENCES, WEBCASTS, AND WORKSHOPS

Our events feature various subject matter experts and seasoned advisors who share the latest trends and best practices across the advisory landscape.



## Leading Industry Studies

### GLOBAL ADVISOR STUDY

Dimensional conducts one of the largest benchmarking studies in the industry, giving you strategic insight into multiple areas of your business.

<b>4,000</b> Firms	<b>15+</b> Countries Represented	<b>10+</b> Years of Data
-----------------------	-------------------------------------	-----------------------------

### GLOBAL INVESTOR STUDY

By directly surveying your clients, this annual survey can help you understand how your clients view your services and the overall advisory relationship.

<b>1,000+</b> Participating Firms	<b>100K+</b> End-Client Responses	<b>10</b> Years of Insights
--------------------------------------	--------------------------------------	--------------------------------

## Pillars of an Advisory Firm

Insights available to you and your team include:

Strategic Planning	Human Capital	Investments and Operations	Growth and Marketing	Client Experience
<ul style="list-style-type: none"> <li>Growing Your Business</li> <li>Firm Financials</li> <li>Key Performance Indicators</li> <li>Corporate Values and Mission</li> <li>M&amp;A and Succession</li> </ul>	<ul style="list-style-type: none"> <li>Compensation Design</li> <li>Organizational Structure</li> <li>Employee Experience and Benefits</li> </ul>	<ul style="list-style-type: none"> <li>Business Continuity Plan</li> <li>Technology Selection</li> <li>Automating Workflows</li> <li>Asset Allocation and Model Portfolios</li> </ul>	<ul style="list-style-type: none"> <li>Marketing Trends</li> <li>Centers of Influence and Client Referrals</li> <li>Value Proposition</li> <li>Sales Tracking</li> </ul>	<ul style="list-style-type: none"> <li>Client Segmentation</li> <li>Improving Your Client Experience</li> <li>Understanding Your Clients</li> </ul>

\*Net Promoter, Net Promoter System, Net Promoter Score, and NPS are registered trademarks of Bain & Company, Inc., Fred Reichheld, and Satmetrix Systems, Inc.

Insights are not meant to constitute investment advice, a recommendation of any securities product or investment strategy (including account type), or an offer of any services or products for sale, nor are they intended to provide a sufficient basis on which to make an investment decision.

---

**FOR PROFESSIONAL USE ONLY. NOT FOR USE WITH RETAIL INVESTORS OR THE PUBLIC.**

The information in this material is intended for the recipient's background information and use only. It is provided in good faith and without any warranty or representation as to accuracy or completeness. Information and opinions presented in this material have been obtained or derived from sources believed by Dimensional to be reliable, and Dimensional has reasonable grounds to believe that all factual information herein is true as at the date of this material. It does not constitute investment advice, a recommendation, or an offer of any services or products for sale and is not intended to provide a sufficient basis on which to make an investment decision. Before acting on any information in this document, you should consider whether it is appropriate for your particular circumstances and, if appropriate, seek professional advice. It is the responsibility of any persons wishing to make a purchase to inform themselves of and observe all applicable laws and regulations. Unauthorized reproduction or transmission of this material is strictly prohibited. Dimensional accepts no responsibility for loss arising from the use of the information contained herein.

This material is not directed at any person in any jurisdiction where the availability of this material is prohibited or would subject Dimensional or its products or services to any registration, licensing, or other such legal requirements within the jurisdiction.

"Dimensional" refers to the Dimensional separate but affiliated entities generally, rather than to one particular entity. These entities are Dimensional Fund Advisors LP, Dimensional Fund Advisors Ltd., Dimensional Ireland Limited, DFA Australia Limited, Dimensional Fund Advisors Canada ULC, Dimensional Fund Advisors Pte. Ltd., Dimensional Japan Ltd., and Dimensional Hong Kong Limited. Dimensional Hong Kong Limited is licensed by the Securities and Futures Commission to conduct Type 1 (dealing in securities) regulated activities only and does not provide asset management services.

**RISKS**

**Investments involve risks. The investment return and principal value of an investment may fluctuate so that an investor's shares, when redeemed, may be worth more or less than their original value. Past performance is not a guarantee of future results. There is no guarantee strategies will be successful.**

**UNITED STATES**

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

**CANADA**

This material is issued by Dimensional Fund Advisors Canada ULC for registered investment advisors, dealers, and institutional investors and is not intended for public use. The other Dimensional entities referenced herein are not registered resident investment fund managers or portfolio managers in Canada.

This material is not intended for Quebec residents.

Commissions, trailing commissions, management fees, and expenses all may be associated with mutual fund investments. Please read the prospectus before investing. Unless otherwise noted, any indicated total rates of return reflect the historical annual compounded total returns, including changes in share or unit value and reinvestment of all dividends or other distributions, and do not take into account sales, redemption, distribution, or optional charges or income taxes payable by any security holder that would have reduced returns. Mutual funds are not guaranteed, their values change frequently, and past performance may not be repeated.

**AUSTRALIA**

In Australia, this material is provided by DFA Australia Limited (AFSL 238093, ABN 46 065 937 671). It is provided for financial advisors and wholesale investors for information only and is not intended for public use. No account has been taken of the objectives, financial situation or needs of any particular person. Accordingly, to the extent this material constitutes general financial product advice, investors should, before acting on the advice, consider the appropriateness of the advice, having regard to the investor's objectives, financial situation and needs.

**NEW ZEALAND**

This material has been prepared and provided in New Zealand by DFA Australia Limited, (incorporated in Australia, AFS License No.238093, ABN 46 065 937 671). This material is provided for financial advisers only and is not intended for public use. All material that DFA Australia Limited provides has been prepared for advisers, institutional investors and clients who are classified as Wholesale investors under the Financial Markets Conduct Act 2013. This material does not give any recommendation or opinion to acquire any financial advice product, and is not financial advice to you or any other person.

**WHERE ISSUED BY DIMENSIONAL IRELAND LIMITED**

Issued by Dimensional Ireland Limited (Dimensional Ireland), with registered office 25 North Wall Quay, Dublin 1, D01 H104 Ireland. Dimensional Ireland is regulated by the Central Bank of Ireland (Registration No. C185067).

Directed only at professional clients within the meaning of Markets in Financial Instruments Directive (MiFID) (2014/65/EU).

**WHERE ISSUED BY DIMENSIONAL FUND ADVISORS LTD.**

Issued by Dimensional Fund Advisors Ltd. (Dimensional UK), 20 Triton Street, Regent's Place, London, NW1 3BF. Dimensional UK is authorised and regulated by the Financial Conduct Authority (FCA) - Firm Reference No. 150100.

Directed only at professional clients as defined by the rules of the FCA.

Dimensional UK and Dimensional Ireland issue information and materials in English and may also issue information and materials in certain other languages. The recipient's continued acceptance of information and materials from Dimensional UK and Dimensional Ireland will constitute the recipient's consent to be provided with such information and materials, where relevant, in more than one language.

**NOTICE TO INVESTORS IN SWITZERLAND:** This is advertising material.

**FOR LICENSED OR EXEMPT FINANCIAL ADVISORS AND INSTITUTIONAL INVESTORS IN SINGAPORE**

This material is deemed to be issued by Dimensional Fund Advisors Pte. Ltd. (UEN:201210847M), which is regulated by the Monetary Authority of Singapore and holds a capital markets services license for fund management.

This material is not an advertisement, has not been reviewed by the Monetary Authority of Singapore, and should not be shown to prospective retail investors.

For use by institutional investors and licensed or exempt financial advisors only in Singapore for internal training and educational purposes and not for the purpose of inducing, or attempting to induce, such institutional investors or financial advisors to make an investment. Not for use with the public.

**FOR LICENSED FINANCIAL ADVISORS AND INSTITUTIONAL INVESTORS IN HONG KONG**

This material is deemed to be issued by Dimensional Hong Kong Limited (CE No. BJE760), which is licensed by the Securities and Futures Commission to conduct Type 1 (dealing in securities) regulated activities only and does not provide asset management services.

For use by licensed financial advisors and institutional investors who are "professional investors" (as defined in the Securities and Futures Ordinance [Chapter 571 of the Laws of Hong Kong] and its subsidiary legislation) only in Hong Kong. This material is provided solely for internal training and educational purposes and is not for the purpose of inducing, or attempting to induce, such financial advisors and institutional investors to make an investment nor for the purpose of providing investment advice. Not for use with the public. This material is not intended to constitute and does not constitute marketing of the services of Dimensional Hong Kong or its affiliates to the public of Hong Kong.

Financial advisors in Hong Kong shall not actively market the services of Dimensional Hong Kong Limited or its affiliates to the Hong Kong public.