Dimensional

The Women *&* Wealth *Community*

Since 2015, Dimensional has been bringing financial advisors together to share insights on women and wealth. While industry studies highlight the increasing economic power of women, our view is that the wealth management industry can do more to serve this diverse client base. That's why Dimensional is committed to exploring how we can help advisors offer women a better investment experience.

Events

Dimensional offers many resources as well as live, virtual, in-person and recorded events featuring Dimensional leaders, advisors and professionals in the community.

DEEPEN YOUR EXPERTISE
Live webcasts for advisors and financial professionals offer education on women's financial needs.

SHARE INSIGHTS
Interactive virtual workshops provide financial professionals an opportunity to collaborate with one another in online breakout conversations.

ELEVATE YOUR PRACTICE
Explore foundational themes with a small group of financial professionals through an in-person workshop.

BUILD YOUR COMMUNITY
Create authentic connections with other financial professionals and share knowledge at the annual summit, which includes structured networking opportunities and sessions featuring subject-matter experts and breakout peer-group conversations.

HOST AN EVENT FOR YOUR TEAM
Virtual and in-person advisor events are customised to help firms address the needs that are most important to their practice.

FOSTER INTENTIONAL CONNECTION
A conversation circle can foster bonds and trust with clients, prospects, and centres of influence. The format allows participants time for self-reflection as well as learning from the group through intentional sharing and listening.

HOST YOUR OWN CLIENT EVENT
Virtual and in-person end-client events are customised to help firms address the needs that are most important to their clients.

LEARN HOW TO FACILITATE A CIRCLE
Gain all the tools and resources you need to host circles in your own practice through the conversation-circle workshop.

EVENT THEMES AND TOPICS INCLUDE:

- Understanding *her* financial experience
- Building more meaningful relationships
- Applying strategy to life
- Working with women experiencing divorce
- Navigating loss and working with widows
- In working with couples, how are you connecting with *her*?
- Understanding the needs of caregivers
- Communicating investments
- Addressing ESG investing
- Discussing charitable giving with your clients
- Building a women's initiative at your firm
- Crafting and delivering your message
- Creating connective content
- Hosting client events
- Establishing a client referrals process
- The money conversation
- Giving with gladness
- Raising financially responsible children
- Purpose in retirement
- What's on your stop-doing list
- Resilience
- Confidence
- Defining your own enough
- New year, what's next
- Pursuing a better investment experience
- Reframing retirement

Contact your Regional Director to learn more about becoming part of the Women & Wealth Community.

MKT-54373 03/25