

## Dimensional Wealth Model Availability

We have designed the Dimensional Wealth Models with advisors in mind. The Dimensional Wealth Models are strategic asset allocation models composed entirely of Dimensional funds. Our transparent, research-backed model allocations allow you to streamline your investment process, so you have more time to serve clients and develop your business.

### ► Scale and Efficiency

Harness Dimensional’s investment expertise while freeing up time to serve clients and strategically manage and grow your business.

### ► Systematic and Transparent

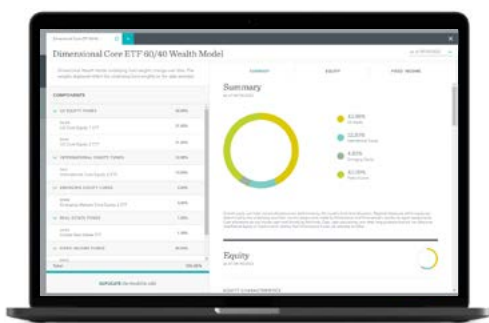
Deliver a systematic, transparent investment approach that’s easy to explain.

### ► Extensive Support

Access a broad selection of materials and consult with our service team on portfolio matters, client questions, and solutions.

## Visit Our Model Center

You can access a powerful model-building and analysis tool on MyDimensional. The [Model Center](#) enables you to review and compare characteristics and returns for each model set and create and compare your own custom models.



### Model Resources

Dimensional offers professional and client-ready materials to help you integrate our Wealth Models into your business.

Resources include:

- Client-ready brochure
- Model set profiles
- Fact sheets
- Quarterly update commentary
- Research papers and articles
- Model rebalance notification subscription
- Videos
- Webcasts

### What’s the Value of Models for Advisors?

A recent study of multiyear survey data from Dimensional’s annual Global Advisor Study suggests that advisory firms that use models tend to grow faster.<sup>1</sup>

1. Dai et al. examined five years of data from an annual survey of around 900 US firms that account for about \$250 billion in AUM. In the study, they find that the use of model portfolios and the number of model portfolios are both positively correlated with AUM growth. On average, firms that offer model portfolios have 5.5 percentage points higher AUM growth in the current year compared to firms that don’t. For more information, see Wei Dai, Marco Di Maggio, Kaitlin Hendrix, Wiebke Lamping, Savina Rizova, and Trey Roberts, “What Drives Growth for Financial Advisors? Evidence From a Multi-Year Survey” (white paper, Dimensional Fund Advisors, May 2023).

## Model Lineup and Platforms

The models combine a systematic asset allocation framework with daily, active implementation to help investors pursue a wide range of investment goals. Each model set is designed for total portfolio emphasis on reliable drivers of higher expected returns across equity markets (size, value, and profitability) and fixed income markets (term, credit, and currency of issuance).<sup>2</sup>

The models are generally rebalanced quarterly and available on MyDimensional.com, our secure website. You can also access certain models on other platforms. Individual model set availability and certain model parameters may vary by platform.<sup>3</sup>

Wealth Model Sets	Platform				
	MyDimensional	Investnet	GeoWealth Model Marketplace	Orion <sup>4</sup>	Advyzon Nucleus <sup>5</sup>
<b>Core Market</b> Allocations for a relatively <b>modest</b> portfolio emphasis on higher expected returns and limited deviation from the market	●	●			
<b>Core</b> Allocations for a relatively <b>moderate</b> portfolio emphasis on higher expected returns	● ●	● ●	●	●	●
<b>Core Plus</b> Allocations for a relatively <b>strong</b> portfolio emphasis on higher expected returns	● ●	● ●	●	●	●
<b>Sustainability</b> Allocations that align certain sustainability values with investment goals, focusing on scientific drivers of climate change <sup>6</sup>	● ●	●			
<b>Social</b> Allocations that align certain social values with investment goals, seeking to exclude companies involved in areas of social concern <sup>7</sup>	●	●			
<b>Tax-Sensitive</b> Allocations for tax-sensitive investors, including funds with a focus on municipal bonds within fixed income	●	●			

2. For more detailed information on each model set, see Dimensional Wealth Model Profiles.

3. A cash allocation of up to 2% is included in the models on certain platforms and applied pro rata where included. Availability as of April 30, 2024.

4. Available through both Orion Communities and Orion Portfolio Solutions.

5. Available through Advyzon Investment Management.

6. The funds are designed to incorporate environmental and other sustainability considerations and are governed by their prospectuses.

7. Dimensional uses a combination of internal and external data from third-party data providers to evaluate issuers on social criteria for its social funds. Historically, the screens established for Dimensional's social funds take into account the Socially Responsible Investment Guidelines for the United States Conference of Catholic Bishops (USCCB), among other factors. The social funds are governed by their prospectus and are not intended to be managed in precise conformity with the USCCB investment guidelines and principles.

Dimensional has decades of experience in designing and managing multi-asset solutions. We apply a consistent approach across all of our models while staying responsive to the evolving needs of financial professionals and their clients.

We believe Dimensional Wealth Models can help you deliver effective investment solutions while scaling your business for growth and success.

### Learn More

Contact a Dimensional representative or visit the Dimensional Wealth Models Collection on [MyDimensional](#).

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Dimensional makes available certain model portfolios ("Dimensional Wealth Models"). The Dimensional Wealth Models are provided "as is." Dimensional has no obligation to continue to maintain or take any other action with respect to the Dimensional Wealth Models and may stop providing any update of (and may cease to take any action with respect to) the Dimensional Wealth Models at any time in its sole and absolute discretion. Dimensional is not responsible for implementing the Wealth Models (e.g., selecting broker-dealers, executing trades, or seeking best execution).

The Dimensional Models are provided for informational purposes only and should not be considered investment advice, a recommendation, or an offering of any services or products for sale. The Dimensional Models are not intended as a sufficient basis on which to make an investment decision. Certain investments included in the Models may not be suitable for investors, nor do they represent a complete investment program.

The Dimensional Research and Portfolio Management teams (the "Model Team") developed the Dimensional Models. The Model Team, with oversight from Dimensional's Investment Committee, generally expects to select funds for the Models managed by Dimensional ("Dimensional Funds") without considering the universe of funds sponsored by persons not affiliated with Dimensional or its affiliates ("Third Party Funds"), even though there may or may not be Third Party Funds that may be more appropriate for inclusion in such Dimensional Models. To the extent a user implements all or part of a Model, this will generate advisory and other fees for Dimensional or its affiliate, and the management fees of Dimensional funds may be higher than fees charged by Third Party Funds.

Use of the Models does not imply that Dimensional has provided any legal, tax, or accounting advice or recommendations in relation to the Models or advice on whether it would be advisable for any institutional investor, registered investment advisor ("Advisor"), or client of the Advisor to invest in any Model or Dimensional Funds.

Dimensional is providing information in the form of Dimensional Models as ideas for possible construction of portfolios centered around the Dimensional Funds and not as investment advice or research. Dimensional is not providing any investment, tax, or financial advice to any institutional investor, Advisor, or any client of the Advisor, and has no obligation to, and will not take into account the tax status, investment goals, or other characteristics of any Advisor or any client of the Advisor when compiling the Dimensional Models. Dimensional is not acting as a fiduciary to any institutional investor, Advisor, or any client of the Advisor, nor is any institutional investor, Advisor, or any client of the Advisor entering into any type of advisory or other relationship with Dimensional.

The risk of the Models is subject to the risk of the Dimensional Funds, which can be found in the applicable prospectus, and the selection of Dimensional Funds and the allocation and reallocation of Model assets may not produce a desired result.

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