

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).²

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.³

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