



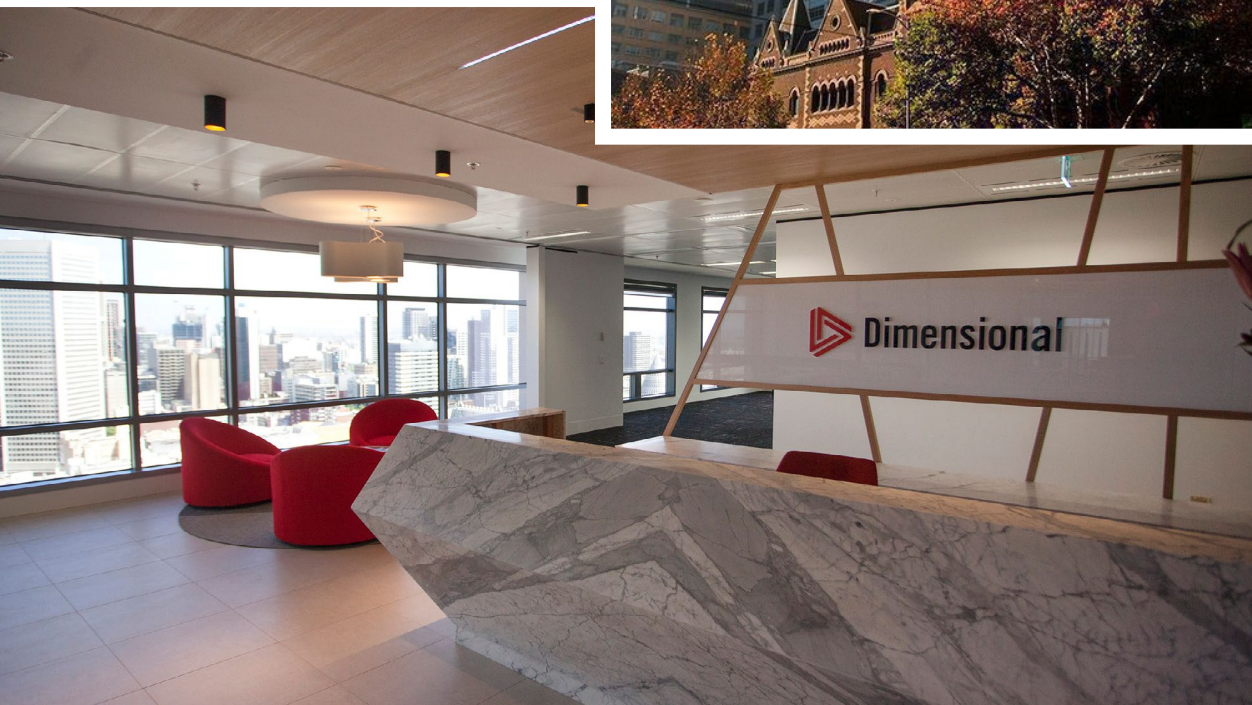
# 2025 EVENTS BROCHURE

AUSTRALIA & NEW ZEALAND

Years of  
Innovation in  
Australia







# 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 organise 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,

A handwritten signature in black ink, reading 'N. Krieger'.



**Nathan Krieger**  
Head of Client Group, Australia  
and Vice President



# 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 organised by series based on topic area and audience—and certain sessions offer CPD credits for financial professionals. Many sessions are recorded for viewing through [my.dimensional.com](https://mydimensional.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](https://mydimensional.com/events).

	INVESTMENTS	COMMUNICATION	STRATEGY
Dimensional Investing	✓		
Insights from a Thought Leader	✓		✓
Practice Management			✓
Effective Communication		✓	✓
Market Reviews	✓		

## Dimensional Investing

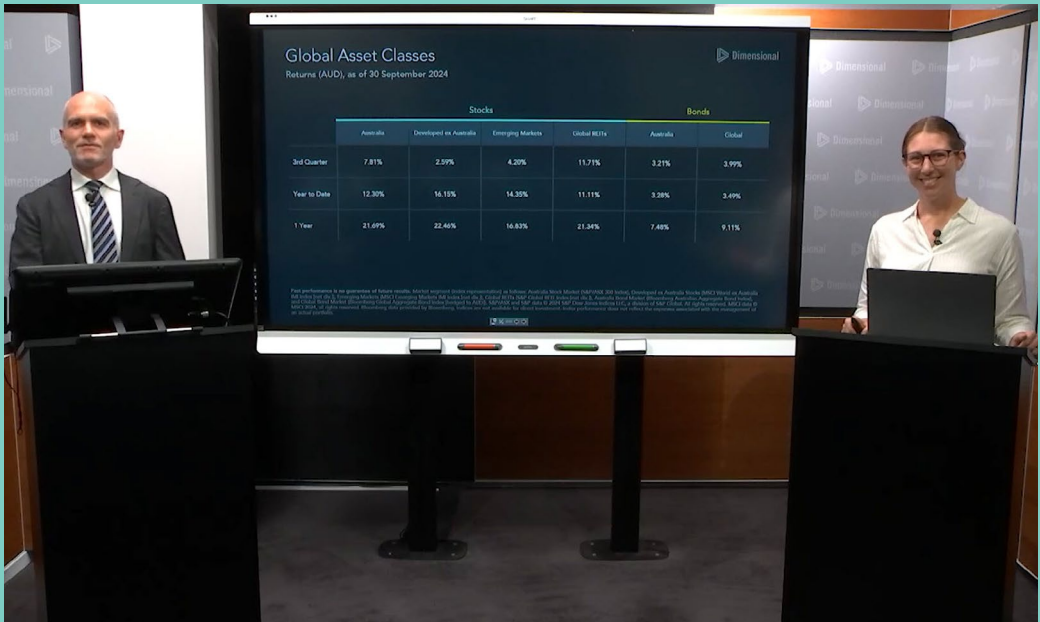
This series features Dimensional investment specialists offering a deeper perspective on investment performance, strategy implementation and global markets. Past webcasts have featured Dimensional equity ETFs, core bond strategies, inflation solutions and new Dimensional strategies.

## 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.

## 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.

# 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.

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*Please note seats are limited, and dates may be subject to change.*

	INVESTMENTS	COMMUNICATION	STRATEGY
Investment Essentials Masterclass	✓	✓	
Foundations Conference	✓	✓	✓
Deals and Succession Conference			✓
Advanced Conference	✓	✓	✓
Practice Management Symposium		✓	✓
New Zealand Symposium	✓	✓	✓
Sustainability Conference	✓		
Communications Workshop		✓	



# Investment Essentials Masterclass

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## *Virtual event only*

This virtual masterclass gives you the opportunity to hear from Dimensional's investment and research professionals about Dimensional's investment philosophy and how it translates into real-world solutions.

See how we design and trade our trusts and how we differ to other approaches. Learn about how to communicate this approach to your clients.



# Foundations Conference

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## *In-Person event only*

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.

# Deals and Succession Conference

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*By invitation only / In-person event only*

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.

# Advanced Conference

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*By invitation only / In-person event only*

This two-day event contemplates investment ideas at a much deeper level and features leading thinkers and practitioners in finance and wealth management.

To help clients familiar with Dimensional's approach deepen their understanding of leading thinking on investment, while introducing them to world best-practice ideas in growing wealth management businesses

# Practice Management Symposium

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*By invitation only / In-person event only*

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.



# New Zealand Symposium

*By invitation only / In-person event only*

This one-day conference delves deeper into Dimensional's investment ideas and offers insights into communication strategies and best practice management. The Symposium encourages participation and offers attendees a unique opportunity to network with like-minded individuals and industry experts.

# Sustainability Conference

*In-person and virtual event*

Dimensional's Sustainability Conference is a unique event built to showcase timely insights from subject matter experts in academia, as well as the firm's Responsible Investment team. This conference will provide a great continuous learning opportunity with the ability to ask questions of the presenters.



# Communications Workshop

*In-person event only*

The 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.

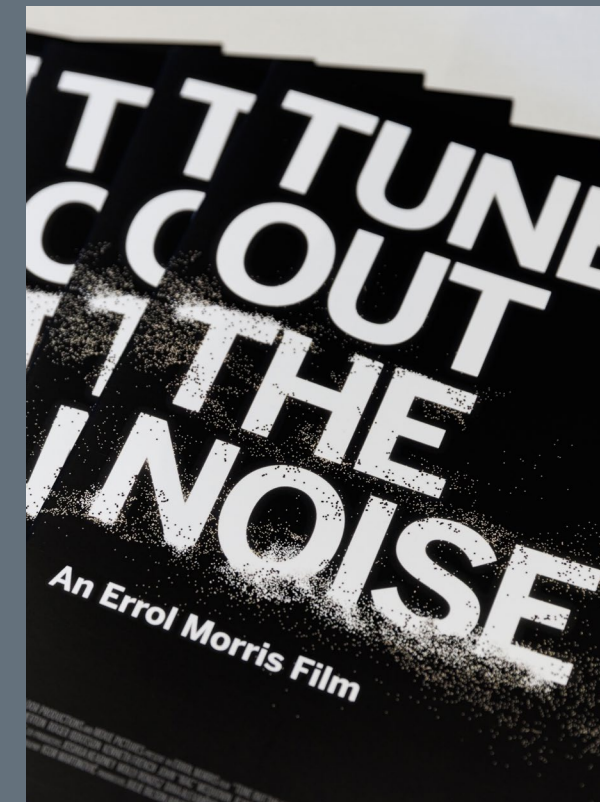
Attendees will walk away with an action plan to answer specific questions and objections regularly encountered by advisors.



# Tune Out the Noise

At Dimensional, we often say our story is bigger than the firm itself. It's a story about how finance became a science and challenged the traditional methods of investing. That, in turn, led to the invention of index funds, the founding of Dimensional Fund Advisors and the evolution of client-focused advice—advances that have benefitted generations of investors. Dimensional believes these developments can help even more investors have the experience they deserve. That is why we worked with Academy Award-winning filmmaker Errol Morris on *Tune Out the Noise*. Our hope is that the documentary will show people around the world that there's a better way to invest.

To book a screening, please contact your Dimensional representative.





Dimensional AU/NZ Events

Please note dates may be subject to change.

DATE	EVENT	LOCATION	DATE	EVENT	LOCATION
05 MAR	Foundations Conference	Melbourne, VIC	12 AUG	Foundations Conference	Wellington, NZ
01 APR	Foundations Conference	Brisbane, QLD	14 AUG	Foundations Conference	Auckland, NZ
29/30 APR	Investment Essentials Masterclass	Virtual	04 SEP	Foundations Conference	Sydney, NSW
08 MAY	Foundations Conference	Perth, WA	09 SEP	Foundations Conference	Adelaide, SA
20 MAY	Foundations Conference	Sydney, NSW	11/12 SEP	Investment Essentials Masterclass	Virtual
28/29 MAY	Practice Management Symposium*	Sydney, NSW	30/31 OCT	Advanced Conference*	Melbourne, VIC
26 JUN	New Zealand Symposium*	Auckland, NZ	11 NOV	Foundations Conference	Melbourne, VIC
30 JUL	Foundations Conference	Melbourne , VIC	25 NOV	Foundations Conference	Sydney, NSW
*By invitation only			*By invitation only		