

Global Advisor Study

Benchmark Your Firm Against Industry Leaders

Dimensional's Global Advisor Study is the industry's largest benchmarking tool,¹ featuring 15 years of data from more than 4,000 firms worldwide. Firms can compare performance against peers, track business metrics year over year, and uncover strategic opportunities through a dynamic dashboard that is

available exclusively to study participants. As part of the Dimensional 360® offering for financial professionals, the study helps firms make data-informed business decisions—and paired with ongoing support from Dimensional's Practice Management team—enables them to tackle business challenges head on.

Why Participate?

- Access **peer business insights** to benchmark your firm today and plan for tomorrow.
- Stay competitive with **compensation data** to inform pay and incentive strategy.
- Measure performance by comparing **productivity and profitability metrics** with revenue peers.
- Unpack profitability with detailed **income statement analysis** to identify cost drivers and opportunities.
- Gain insight into how other firms make **asset allocation decisions**.
- Track progress over time through **individualised trend reporting** (for multiyear participants).

What You'll Explore

In its 16th year, the 2026 Global Advisor Study consists of a core set of questions and four optional modules. Note: Firms must participate in an optional module to receive access to its related findings.

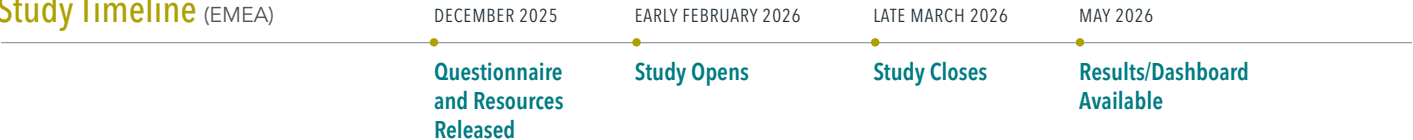
Core Business Metrics REQUIRED Collects basic firm information such as services offered, organisational structure, and top business challenges.	Roles and Compensation OPTIONAL Collects salary and bonus information for all roles as well as insights into key firm roles.
Income Statement OPTIONAL Captures firm revenue and expenses for key functional areas.	Investments OPTIONAL Delves into how firms are designing, constructing, and delivering investment products to their clients.
	Compliance and Cybersecurity OPTIONAL Examines how firms address compliance procedures, business continuity, and data security.

What to Expect

All firms working directly with Dimensional are invited to participate in the Global Advisor Study and will receive email communications with additional details and resources.

The study consists of a secure online questionnaire—expect 45 minutes for the core module and up to 30 per optional module. A unique, shareable link will be distributed for collaboration.

Study Timeline (EMEA)



Scan QR code to learn more about Dimensional's Global Advisor Study.

If you have any questions or need assistance, please contact the Dimensional Practice Management team at EMEA_practice_management@dimensional.com.

Did You Know?

Dimensional Practice Management offers firms exclusive access to the Global Investor Study. This business tool is designed to help firms gain client insights on a range of issues, including:

- What clients want in an advisory relationship
- Their main financial needs and concerns
- The services they value most
- Their willingness to refer you to others

The Global Investor Study is available year-round, allowing you to access this tool whenever it is best for your business.

To learn more about the Global Investor Study and how to participate, please contact your Dimensional representative or visit [MyDimensional](#).



Dimensional 360® is a suite of services available to financial professionals who work with Dimensional Fund Advisors.

Learn more [here](#).

1. Based on Dimensional analysis of published and publicly available information from other known industry surveys in 2025.

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