



# 2026 EVENTS BROCHURE



Benchmark Study

Firm Metrics

|                     |  |
|---------------------|--|
| AUM Growth Rate     |  |
| Revenue Growth Rate |  |
| FTE                 |  |
| Revenue / FTE       |  |
| Operating Profit    |  |

See Appendix Dimensional 2019 Global Advisor Benchmarking Data  
11.1.2019 12:00, quarterly, 2018 firm, 2017-2019 quarterly, 11.1.2019



# 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 organize 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,

*Bryce D. Skaff*



**Bryce Skaff**  
Co-Head of Global  
Client Group

*Carlo Venes*



**Carlo Venes**  
Co-Head of Global  
Client Group

*Mark R. Gochmour*



**Mark Gochmour**  
Head Of Global  
Client Services

# 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 organized by series based on topic area and audience—and certain sessions offer CE 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 | ✓           |               | ✓        |
| Investor Experience            |             | ✓             | ✓        |
| 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 and fixed income 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.

## Investor Experience

Dimensional investment and client communications teams offer insights into current markets and long-term investing. The series is designed to help end-investors gain a deeper perspective on issues affecting their financial journey. Previous webcasts have offered insights on bond investing in the current market, elections and market performance, value vs. growth investing, market lessons from the pandemic, and sustainability investing.



## 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. These quarterly webcasts feature equity and fixed income market reviews for the US, developed, and emerging markets.

# 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.

*Dimensional Fund Advisors LP is an investment advisor registered with the Securities and Exchange Commission. This information is provided for registered investment advisors and institutional investors and is not intended for public use.*

*Please note dates may be subject to change.*

|                                 | INVESTMENTS | COMMUNICATION | STRATEGY |
|---------------------------------|-------------|---------------|----------|
| Foundations Conference          | ✓           | ✓             | ✓        |
| Applied Investments Conference  | ✓           |               |          |
| Applied Communications Workshop |             | ✓             |          |
| Deals & Succession Conference   |             |               | ✓        |
| Practice Management Symposium   |             |               | ✓        |
| Annual Institutional Symposium  | ✓           | ✓             |          |
| Investor Symposium              | ✓           |               |          |
| Specialty Conferences           | ✓           | ✓             | ✓        |
| Lunch & Learns                  | ✓           |               |          |

# Foundations Conference

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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.



# Applied Investments Conference

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The Applied Investments Conference explores investment-related themes in much greater detail while focusing on strategy implementation. Dimensional strategists and leaders throughout the firm speak on a diverse range of topics including in-depth discussions on how academic research should be applied to the investment process; review of Dimensional's portfolio design, management, and trading; and updates on investment research and market themes.

Attendees should have a foundational knowledge of Dimensional's investment philosophy prior to attending. This event is offered in a one day and one and half day format.

# Applied Communications Workshop

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The Applied 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.



# Communications Masterclass

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The Communications Masterclass is a deep dive into structuring impactful investment conversations between advisors and their clients and prospects. Content will move beyond the basics of communication frameworks leading to deeper discussion, exploration, and application of nuanced approaches across a wide range of client interactions. This day-and-a-half event will equip attendees with practical tools to elevate their client communication.

Attendees should be familiar with and/or have previously attended an Applied Communications Workshop.

# Investor Symposium

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The Investor Symposium features talks by Dimensional thought leaders and senior-level speakers. Presentations introduce key investment principles, describe Dimensional's investment process, and contrast a market-based approach to alternative management styles. The sessions also highlight the important role that advisors play during the investment journey.

Advisors may use the event to strengthen their relationships and build client/prospect confidence in Dimensional's way of investing. Audience interaction is encouraged.

*This event is intended for retail clients and their advisors.*



# Lunch & Learns

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Lunch & Learns are designed as compact, pop-in sessions for financial professionals to gain timely insights on key investment themes, with opportunities to explore different strategies and solutions available for client portfolios. These interactive settings offer a chance to connect with Dimensional speakers and peers to exchange perspectives, and attendees will walk away with actionable items and important updates.

## Specialty Conferences

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Our Specialty Conferences offer a wide array of content from institutional investing, practice management topics, and more. These conferences provide attendees with the opportunity to hear and ask questions from subject matter experts in academia. Specialty conference content will showcase timely insights and an in-depth learning opportunity of Dimensional's investment approaches. These unique events happen annually both in our offices and virtually.



## Annual Institutional Symposium

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The Annual Institutional Symposium is our largest institutional event of the year, designed to bring together institutional investment professionals from around the world to share their thoughts and ideas. Attendees will hear the latest thinking from leading academics, industry experts, and Dimensional leaders on a range of topics from the economy and markets to the latest academic research in finance and more.

## Deals & Succession Conference

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The Deals & 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.



## Practice Management Symposium

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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.

Dimensional US Events

Please note dates may be subject to change.

| DATE                                                        | EVENT                           | LOCATION       | CE AVAILABLE |
|-------------------------------------------------------------|---------------------------------|----------------|--------------|
| Jan 27                                                      | Foundations Conference          | Jacksonville   | *            |
| Jan 28                                                      | Lunch & Learn                   | Tampa          | *            |
| Jan 29                                                      | Lunch & Learn                   | Miami          | *            |
| Feb 4                                                       | Foundations Conference          | Charlotte      | *            |
| Feb 5                                                       | Applied Communications Workshop | Charlotte      |              |
| Feb 11–12                                                   | Applied Investments Conference  | Austin         | *            |
| Feb 18                                                      | Virtual Foundations Conference  | Virtual        | *            |
| Feb 18                                                      | Foundations Conference          | Dallas         | *            |
| Feb 19                                                      | Virtual Investor Symposium      | Virtual        |              |
| Feb 24                                                      | Foundations Conference          | Scottsdale     | *            |
| Feb 25                                                      | Applied Communications Workshop | Scottsdale     |              |
| Feb 26                                                      | Investor Symposium              | Scottsdale     |              |
| Mar 4–5                                                     | Deals & Succession Conference   | Charlotte      |              |
| Mar 10                                                      | Foundations Conference          | Orange County  | *            |
| Mar 12                                                      | Foundations Conference          | Bay Area       | *            |
| Mar 24                                                      | Foundations Conference          | Philadelphia   | *            |
| Mar 25                                                      | Foundations Conference          | Washington, DC | *            |
| Mar 26                                                      | Applied Communications Workshop | Washington, DC |              |
| Please note CE available conferences are subject to change. |                                 |                |              |

| DATE                                                        | EVENT                           | LOCATION    | CE AVAILABLE |
|-------------------------------------------------------------|---------------------------------|-------------|--------------|
| Apr 8                                                       | Foundations Conference          | Austin      | *            |
| Apr 9                                                       | Applied Communications Workshop | Austin      |              |
| Apr 22–23                                                   | Annual Institutional Symposium  | Austin      |              |
| May 6                                                       | Lunch & Learn                   | Atlanta     | *            |
| May 7                                                       | Lunch & Learn                   | Charleston  | *            |
| May 13                                                      | Lunch & Learn                   | Des Moines  | *            |
| May 14                                                      | Lunch & Learn                   | Kansas City | *            |
| May 20–21                                                   | Investor Symposium              | Austin      |              |
| May 27                                                      | Virtual Foundations Conference  | Virtual     | *            |
| Jun 10                                                      | Applied Investments Conference  | Minneapolis | *            |
| Jun 11                                                      | Applied Investments Conference  | Denver      | *            |
| Jun 24–25                                                   | Applied Investments Conference  | Charlotte   | *            |
| Please note CE available conferences are subject to change. |                                 |             |              |

Dimensional US Events

Please note dates may be subject to change.

| DATE                                                        | EVENT                           | LOCATION       | CE AVAILABLE |
|-------------------------------------------------------------|---------------------------------|----------------|--------------|
| Jul 8                                                       | Foundations Conference          | Santa Monica   | *            |
| Jul 9                                                       | Applied Communications Workshop | Santa Monica   |              |
| Jul 15                                                      | Lunch & Learn                   | Cincinnati     | *            |
| Jul 16                                                      | Lunch & Learn                   | Nashville      | *            |
| Jul 28                                                      | Foundations Conference          | Chicago        | *            |
| Jul 29                                                      | Applied Investments Conference  | Chicago        | *            |
| Jul 30–31                                                   | Communications Masterclass      | Chicago        |              |
| Aug 4                                                       | Foundations Conference          | Boise          | *            |
| Aug 5                                                       | Foundations Conference          | Salt Lake City | *            |
| Aug 6                                                       | Lunch & Learn                   | Las Vegas      | *            |
| Aug 12                                                      | Lunch & Learn                   | Portland       | *            |
| Aug 13                                                      | Applied Investments Conference  | Seattle        | *            |
| Aug 26                                                      | Foundations Conference          | Charlotte      | *            |
| Aug 27                                                      | Applied Communications Workshop | Charlotte      |              |
| Sep 2–3                                                     | Applied Investments Conference  | Santa Monica   | *            |
| Sep 9                                                       | Virtual Foundations Conference  | Virtual        | *            |
| Sep 10                                                      | Virtual Investor Symposium      | Virtual        |              |
| Please note CE available conferences are subject to change. |                                 |                |              |

| DATE                                                        | EVENT                           | LOCATION     | CE AVAILABLE |
|-------------------------------------------------------------|---------------------------------|--------------|--------------|
| Oct 6                                                       | Applied Investments Conference  | Boston       | *            |
| Oct 7                                                       | Applied Investments Conference  | New York     | *            |
| Oct 8                                                       | Lunch & Learn                   | New York     | *            |
| Oct 13                                                      | Foundations Conference          | Milwaukee    | *            |
| Oct 14                                                      | Foundations Conference          | Ann Arbor    | *            |
| Oct 15                                                      | Foundations Conference          | St. Louis    | *            |
| Oct 21–22                                                   | Practice Management Symposium   | Charlotte    |              |
| Nov 11                                                      | Foundations Conference          | Austin       | *            |
| Nov 12                                                      | Applied Communications Workshop | Austin       |              |
| Dec 2                                                       | Foundations Conference          | Santa Monica | *            |
| Dec 3                                                       | Applied Communications Workshop | Santa Monica |              |
| Dec 9                                                       | Virtual Foundations Conference  | Virtual      | *            |
| Please note CE available conferences are subject to change. |                                 |              |              |

# 2026 Dimensional US Events

- Ann Arbor

Atlanta

Austin

Bay Area

Boise

Boston

Charleston

Charlotte

Chicago

Cincinnati

Dallas

Denver

Des Moines

Jacksonville

Kansas City

Las Vegas
- Miami

Milwaukee

Minneapolis

Nashville

New York

Orange County

Philadelphia

Portland

Salt Lake City

Santa Monica

Scottsdale

Seattle

St. Louis

Tampa

Washington, DC

