

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, 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—enabling 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**.

What You’ll Explore

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

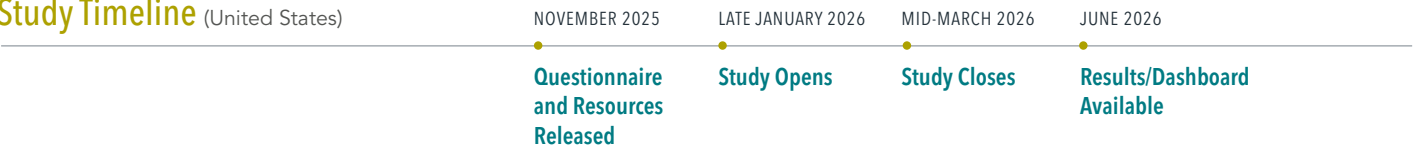
Core Business Metrics REQUIRED Collects basic firm information such as services offered, organizational structure, and top business challenges.	Roles and Compensation OPTIONAL Collects salary and bonus information for all roles as well as insights into key firm roles.
Income Statement OPTIONAL Captures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

What to Expect

Firms participating in the Global Advisor Study 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 (United States)



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 practice_management@dimensional.com.

Dimensional 360® is a suite of services available to financial professionals who work with Dimensional Fund Advisors. It offers a full range of services, tools, and resources to help you improve your client experiences and transform your organization:

- Education and training
- Investment resources
- Client communication
- Business strategy



Dimensional is a global investment manager that has been applying financial science to investing since 1981. Driven by an evidence-based approach, Nobel Prize-winning insights, and decades of expertise pursuing higher returns while maintaining low costs and diversification, we aim to give advisors the strategies, insights, and tools to build customized solutions for investors.

[Learn more](#) about Dimensional and our investment philosophy.

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

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