Dimensional



DIMENSIONAL 360®

NEXT Community for Leaders

Dimensional's NEXT Community for Leaders brings financial professionals together around a shared purpose of developing the next generation of advice. Members can share ideas and best practices, enhance their skills, and impact their business and industry.

Eligible Participants

The community brings professionals who have at least seven years' industry experience and are taking on leadership roles around:

- Managing an advisor team
- Driving business development
- Guiding investment strategy
- Leading financial planning and client service



As a community member, **N**etwork and **EX**pand **T**ogether to:

Advance Your Leadership Skills

Inspire your team, guide your firm through challenges, and improve your personal communication to create a lasting impact within your organization.

Drive Firm Growth

Generate client referrals, develop content that resonates with your ideal client segments, and sponsor client events to create community and grow organically.

Elevate Your Client Experience

Explore strategies to develop personalized and meaningful relationships, use technology to create personalization at scale, and adapt to the evolving needs of your clients.

Integrate Life Principles and Wealth Decisions

Apply Dimensional's Life, Invested™ program to help clients connect investing to real-life experiences, leading to improved discipline, greater confidence, and peace of mind.

Develop Future Leaders

Learn techniques to identify, train, and empower the future leaders at your firm.





Community membership requires a two-year commitment that includes attendance at Dimensional's:

Annual NEXT Summit

A two-day, in-person event featuring workshops, thought leadership panels, and breakout sessions.

Virtual Workshops

Held four times per year, hour-long sessions featuring guest speakers and topical discussions.

To learn more, contact your Regional Director or email **communities@dimensional.com**

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