Dimensional

Dimensional 360® for Insurance Partners

The Insurance Team offers dedicated support to help financial advisors navigate the complex landscape of insurance solutions. We are committed to being a trusted partner, offering tailored guidance on growing a successful business, as well investment thought leadership and resources for client communication.

Practice Management

Global Advisor and Investor Studies
Our global studies provide strategic insights into advisor businesses and clients.

Scaling Your Business
This presentation is designed to help advisors:

- Understand the value Dimensional solutions can offer your clients and business.
- Identify situations in which insurance could be a possible solution.
- Articulate a value proposition and position for best use in various growth channels.

Power of Purpose
This presentation is geared toward helping advisors articulate their purpose by discussing alignment of their mission, vision, and values.

Perception vs. Reality: The Vital Role of Insurance in a Thriving Advisory Practice
In this presentation, learn how top-quartile firms are embracing insurance to provide higher levels of client satisfaction while pursuing business growth.

Thought Leadership

Quarterly Stories
Data-driven perspectives on timely topics to help clients tune out the noise and focus on sound investment principles.

Dimensional Quick Takes
Collection of shareable one-pagers and short videos featuring data visualizations that highlight key investment and market principles.

Above the Fray
A weekly commentary featuring Dimensional's take on current market events.

Robert Merton[1] (Nobel laureate 1997)
Thought leadership on retirement, the importance of tax control, and the role of tax deferral and effective decumulation.

CE Credits on Demand
One-hour videos and materials that meet CE credit requirements for CFP® and Investments & Wealth Institute® professionals. Also features an insurance-focused continuing education module.

Women & Wealth
As part of our professional Communities outreach, we connect advisors who are helping women clients navigate their unique financial challenges.



1. Robert Merton provides consulting services to Dimensional Fund Advisors LP.

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Highlighted below you will find today's most popular topics. We have a wide library of content including supported by members of the Insurance Team and Dimensional's Speakers Bureau. We also collaborate with clients on customized materials.

Presentations

Dimensional Investing
Covers our core investment philosophy and approach, explaining how we aim to add value through research, design, portfolio management, and trading.

Effective Client Communication
Designed to help advisors structure a more effective communication strategy by applying Dimensional's 4S Framework® to different conversations and learning styles.

Communicating Investment Principles (*Matrix Book* Presentation)
Offers guidance through sketches and stories on talking to clients in ways that can enhance their investment understanding and encourage informed decisions.

Stay in Your Seat[1]
Provides a candid look at conventional investment advice and explains why investors should ignore self-styled experts and stay invested through good times and bad.







Dimensional offers webcasts covering a wide range of investment, communications, and practice management topics. We also can customize presentations for professional and client groups.

1. Client-ready presentation.