Dimensional

DIMENSIONAL 360®

2027 EVENTS BROCHURE

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Welcome

I am pleased to present Dimensional's 2027 programme of conferences, workshops and webcasts.

Over the years, Dimensional has been privileged to work with a strong and growing community of exceptional financial professionals, and our programme of events has always been a key part of our offering to clients.



Every event we organise, whether virtual or in person, is designed around our Dimensional 360® suite of services available to an elite community of financial professionals who work with our firm. Our support begins with investments. We can show you how to get the most from leading research and use Dimensional strategies to help you enhance your investment offering. Beyond providing investment information, Dimensional 360® extends across multiple aspects of your business to enhance and scale your value-added services, communicate more effectively with clients, and profitably grow your business.

Our conferences and workshops programme includes the Foundations Conference for financial professionals at the start of their professional journey with Dimensional, as well as more focused quarterly events centred on investments, client communications and business strategy. Other targeted events, held throughout the year, are designed to enhance attendees' understanding of relevant topics in greater detail and provide exposure to a diverse lineup of global experts and thought leaders.

We hope that providing you with a comprehensive schedule will enable you and others in your firm to identify the events that meet your individual and team needs. For more information about these events or to request an invitation, please contact your Regional Director (or Dimensional representative).

We look forward to hosting you at a Dimensional event in the near future.

Best regards,





John S. Romiza
Co-Chief Executive Officer, Director and Vice President
Dimensional Fund Advisors Ltd.

Dimensional Conferences

Dimensional hosts a variety of events throughout the year, focusing on a diverse range of topics suitable to many different audiences.

Each building block within the Dimensional 360® conference programme forms a comprehensive foundation, providing valuable insights on investment theory and implementation, effective client communications and business strategy.

The conference programme 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 that are built around client communication and practice management best practices including webcasts, study groups and tailored workshops.

For more information, or to request an invitation to a specific event, please contact your Dimensional representative.

	INVESTMENTS	COMMUNICATION	STRATEGY
Foundations Conference*	✓	✓	✓
Applied Communications Workshop*		✓	
Applied Business Strategy Workshop*			✓
Lunch and Learn	✓		
Communications Masterclass		✓	✓

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**Please note that virtual–event dates may be subject to change.*

Foundations Conference

The Foundations Conference is designed for financial professionals who are new to Dimensional and for those who want to review foundational concepts. The conference is an engaging learning environment that explores Dimensional's unique investment philosophy and approach to markets. Presentations will include an exploration of our enduring relationship with the adviser and wealth management communities, a deep dive into the research that underpins our investment philosophy, reviews of how we approach markets and manage both equity and fixed income portfolios and a comprehensive view of our available investment solutions. Attendees will leave with a strong understanding of how Dimensional can support their investment offering and communicate it effectively to their clients.

Audience: Advisers, Wealth Managers and Investment Professionals







Applied Communications Workshop

Dimensional's Applied Communications Workshop builds on the introductory content of the Foundations Conference by featuring Dimensional's proprietary 4S Framework®, which combines scripts, stories, sketches and supplements to help elevate communication with clients and prospects.

The programme is designed to help advisers and investment professionals implement powerful ideas and strategies in their business communication, with an aim to make complex investment topics accessible to all.

Audience: Advisers, Wealth Managers and Investment Professionals

Applied Business Strategy Workshop

Building upon data from Dimensional's flagship Global Advisor Study and Global Investor Study, the workshop explores principles and applications of business strategy, including methods for acquiring new clients, growing an advisory practice or wealth management business, developing and engaging with human capital and systematising workflow processes.

Sessions cover a wide range of topics through a series of focused presentations and interactive workshops.

Audience: Advisers, Wealth Managers and Investment Professionals







Webcast Programme: The Dimensional Experience Series

These regular webcasts focus on specific topic areas and are offered for those who are new to Dimensional's ideas or those looking for a refresher on foundational concepts.

Dimensional offers live and recorded webcasts to help you better understand how markets work and what matters in investing. The webcasts feature Dimensional leaders, investment experts and award-winning scholars speaking on a diverse range of topics, including market and economic events, investing principles, developments in modern finance and effective client communications.

Register for upcoming events and view recorded webcasts at *my.dimensional.com/events*.

	INVESTMENTS	COMMUNICATION	STRATEGY
Dimensional Investing	✓		
Insights from a Thought Leader	✓	✓	✓
Practice Management			✓
Effective Communication		✓	✓
Market Reviews	✓		
Women and Wealth Community	✓	✓	✓

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Dimensional Investing

This series features Dimensional investment specialists offering a deeper perspective on investment performance, strategy implementation and global markets. Past webcasts have featured key insights into Dimensional equity and fixed income 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 fintech, cryptocurrency, artificial intelligence, factor-based research, the global economy, central bank actions and market uncertainty.

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 communication teams offer insights and techniques to help advisers improve client understanding of markets and investing and enhance other aspects of communication. Sessions have included using the *Matrix Book* for client education 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 separate equity and fixed income market reviews for the EMEA developed and emerging markets.

Women and Wealth Community

The Women and Wealth Community offers many opportunities for financial professionals to get involved in various events where they can share insights, learn from and network with one another, and deepen their knowledge and understanding of serving different demographics of women.

Dimensional EMEA Events 2027

Please note dates may be subject to change. For the most up to date event information please visit MyDimensional.com.

DATE	EVENT	LOCATION	CPD AVAILABLE
Jan 21	German Partner Conference (Jahresauftakt)	Munich	*
Jan 27	Annual Market Review	Virtual	*
Feb 10	Science of Investing Conference	London	*
Feb 24	Irish Science of Investing Conference	Dublin	*
Feb 24–25	German Applied Business Strategy Workshop	Düsseldorf	*
Mar 3	Applied Communication Workshop	London	*
Mar 10–11	Foundations Conference	London	*
Mar 10–11	German Foundations Conference	Munich	*
Mar 18	Benelux Regional Workshop	Benelux	*
Apr 8	Austrian Science of Investing Conference	Wien	*
Apr 21	Lunch & Learn	TBC	*
Apr 21	Quarterly Market Review	Virtual	*
Apr 29	Science of Investing Conference	Edinburgh	*
May 5–6	Foundations Conference	London	*
May 12–13	Germany Applied Communication Workshop	TBC	*
May 19	Summer Investment Conference	London	*
May 26	Applied Communication Workshop	London	*
Jun 9	Science of Investing Conference	London	*
Jun 15	Applied Communication Workshop	Benelux	*
Jun 24	Applied Business Strategy Workshop	TBC	*
Jun 30–Jul 1	Foundations Conference	London	*
Jul 1	German Investment Principles Conference	Virtual	*
Jul 21	Quarterly Market Review	Virtual	*
Sep 1	Lunch & Learn	TBC	*
Sep 8	Applied Communication Workshop	London	*
Sep 14–15	Applied Communication Masterclass	London	*
Sep 22–23	Foundations Conference	London	*
Sep 22–23	German Foundations Conference	TBC	*
Oct 13	Science of Investing Conference	London	*
Oct 13–14	German Applied Business Strategy Workshop	TBC	*
Oct 20	Quarterly Market Review	Virtual	*
Nov 3	Applied Communication Workshop	London	*
Nov 10	Irish Science of Investing Conference	Dublin	*
Nov 18	Applied Communication Workshop	Glasgow	*
Dec 8–9	Foundations Conference	London	*

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