Dimensional

2027 EVENTS BROCHURE

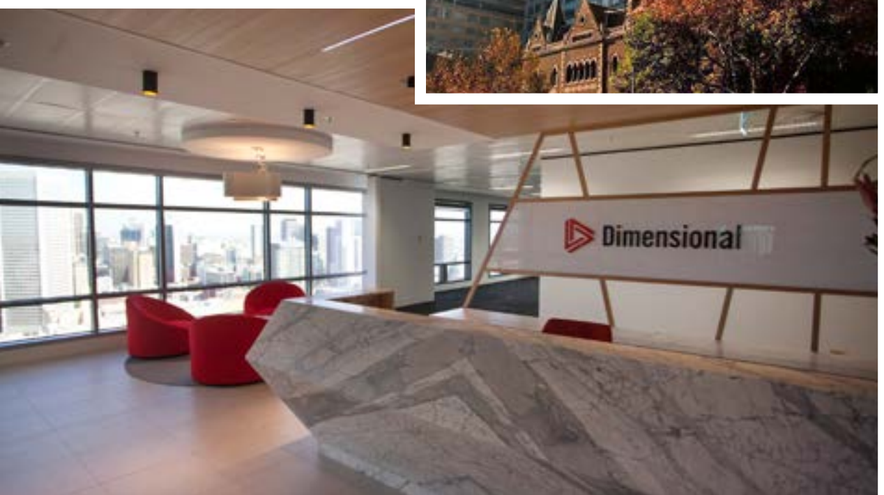
AUSTRALIA & NEW ZEALAND











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 organise 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,



Nathan Krieger
Head of Client Group, Australia
and Vice President

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 organised by series based on topic area and audience—and certain sessions offer CPD credits for financial professionals. Many sessions are recorded for viewing through ***my.dimensional.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.***

	INVESTMENTS	COMMUNICATION	STRATEGY
Market Update	✓		
Dimensional Investing	✓		
Insights from a Thought Leader	✓		✓
Practice Management			✓
Effective Communication		✓	✓

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Market Update

Dimensional's investment team 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 Australian, New Zealand, developed and emerging markets. Every quarter we run two webcasts, one for our Australian audience and one for our New Zealand audience.

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 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.







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.

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.

	INVESTMENTS	COMMUNICATION	STRATEGY
Foundations Conference	✓	✓	✓
Practice Management Symposium		✓	✓
Advanced Conference	✓	✓	✓
New Zealand Symposium	✓	✓	✓
Systematic Investments Symposium	✓		
Deals & Succession Conference			✓
Specialty Conferences	✓	✓	✓
Communication Workshops		✓	

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Please note seats are limited and dates may be subject to change.

Foundations Conference

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's strategies.

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.

Register your interest here.







Practice Management Symposium

By invitation only

The Practice Management Symposium explores a plethora of topics surrounding how to manage and grow your business. You'll hear from Dimensional's leaders as well as industry experts and practitioners. Informed by data from Dimensional's Global Advisor and Global Investor Studies, as well as industry trends, the sessions cover a wide range of practice management topics including business development, client and employee experience and operational efficiencies.

Advanced Conference

By invitation only

This two-day event contemplates investment ideas at a deeper level and features leading thinkers and practitioners in finance and wealth management.

To help clients familiar with Dimensional's approach deepen their understanding on leading investment approaches, while introducing them to best-practice ideas in growing wealth management businesses.

New Zealand Symposium

By invitation only

This two-day conference delves deeper into Dimensional's investment ideas and offers insights into communication strategies and practice management. The Symposium encourages participation and offers attendees a unique opportunity to network with like-minded individuals and industry experts.

Systematic Investments Symposium

By invitation only

The Systematic Investments Symposium is our largest event bringing together institutional, financial institutions, and asset consulting investment professionals. Attendees will hear the latest thinking from leading academics, industry experts, and Dimensional leaders on a range of topics from markets to the latest academic research in finance and more.

Deals & Succession Conference

By invitation only

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.







Specialty Conferences

Our Specialty Conferences offer a wide array of content from institutional investing, practice management topics, sustainability 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 on Dimensional's investment approaches.

Communication Workshops

The Communication Workshops are designed to assist advisors in structuring a more effective communication strategy with clients and prospects. The sessions aim to provide advisors with 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 concerns regularly encountered by advisors.

Dimensional AU/NZ Events

Please note dates may be subject to change.

DATE	EVENT	LOCATION	CPD AVAILABLE
16 Feb	Foundations Conference	Melbourne, VIC	✓
25 Feb	Systematic Investments Symposium*	Sydney, NSW	
02 Mar	Foundations Conference	Sydney, NSW	✓
10/11 Mar	Practice Management Symposium*	Sydney, NSW	✓
05 May	Foundations Conference	Perth, WA	✓
20 May	Foundations Conference	Brisbane, QLD	✓
01 Jun	Foundations Conference	Wellington, NZ	✓
03 Jun	Foundations Conference	Auckland, NZ	✓

** By invitation only.*
Please note CPD available conferences are subject to change.

DATE	EVENT	LOCATION	CPD AVAILABLE
09 Jun	Foundations Conference	Sydney, NSW	✓
22/23 Jul	New Zealand Symposium*	Queenstown, NZ	✓
29 Jul	Foundations Conference	Melbourne, VIC	✓
02 Sep	Foundations Conference	Sydney, NSW	✓
14/15 Oct	Advanced Conference*	TBA	✓
21 Oct	Foundations Conference	Adelaide, SA	✓
23 Nov	Foundations Conference	Sydney, NSW	✓
30 Nov	Foundations Conference	Melbourne, VIC	✓

** By invitation only.*
Please note CPD available conferences are subject to change.

2027 Dimensional Australia and New Zealand Event Locations

Adelaide
Auckland
Brisbane
Melbourne
Perth
Sydney
Queenstown
Wellington

