Dimensional

2027 EVENTS BROCHURE







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.

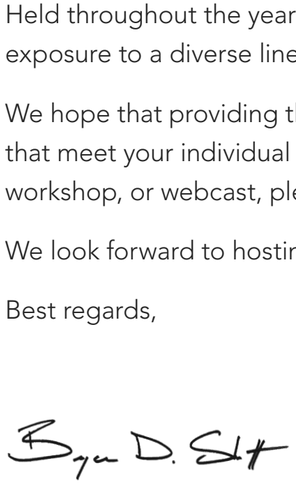
Every conference, workshop, and webcast we organize is designed around one or more of the following themes: investments, communication, and strategy. However, clients frequently tell us that it is the opportunity to network and share ideas with peers that elevates the experience beyond the purely educational 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,



Bryce Skaff
Co-Head of Global
Client Group



Carlo Venes
Co-Head of Global
Client Group





Mark Gochnour
Head Of Global
Client Services

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 organized by series based on topic area and audience—and certain sessions offer CE 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
Dimensional Investing	✓		
Insights from a Thought Leader	✓		✓
Investor Experience		✓	✓
Practice Management			✓
Effective Communication		✓	✓
Market Reviews	✓		

Dimensional Fund Advisors LP is an investment advisor registered with the Securities and Exchange Commission.
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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 Dimensional equity and fixed income 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.

Investor Experience

Dimensional investment and client communications teams offer insights into current markets and long-term investing. The series is designed to help end-investors gain a deeper perspective on issues affecting their financial journey. Previous webcasts have offered insights on bond investing in the current market, elections and market performance, value vs. growth investing, market lessons from the pandemic, and sustainability investing.







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.

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 equity and fixed income market reviews for the US, developed, and emerging markets.

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	✓	✓	✓
Applied Investments Conference	✓		
Applied Communications Workshop		✓	
Deals & Succession Conference			✓
Practice Management Symposium			✓
Annual Institutional Symposium	✓	✓	
Investor Symposium	✓		
Specialty Conferences	✓	✓	✓
Lunch & Learns	✓		
Communications Masterclass		✓	✓

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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.

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.







Applied Investments Conference

The Applied Investments Conference explores investment-related themes in much greater detail while focusing on strategy implementation. Dimensional strategists and leaders throughout the firm speak on a diverse range of topics including in-depth discussions on how academic research should be applied to the investment process; review of Dimensional's portfolio design, management, and trading; and updates on investment research and market themes.

Attendees should have a foundational knowledge of Dimensional's investment philosophy prior to attending. This event is offered in a one day and one and half day format.

Applied Communications Workshop

The Applied Communications Workshop is designed to assist advisors in structuring a more effective communication strategy with clients and prospects. The sessions aim to provide advisors 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 objections regularly encountered by advisors.





Communications Masterclass

The Communications Masterclass is a deep dive into structuring impactful investment conversations between advisors and their clients and prospects. Content will move beyond the basics of communication frameworks leading to deeper discussion, exploration, and application of nuanced approaches across a wide range of client interactions. This day-and-a-half event will equip attendees with practical tools to elevate their client communication.

Attendees should be familiar with and/or have previously attended an Applied Communications Workshop.

Investor Symposium

The Investor Symposium features talks by Dimensional thought leaders and senior-level speakers. Presentations introduce key investment principles, describe Dimensional's investment process, and contrast a market-based approach to alternative management styles. The sessions also highlight the important role that advisors play during the investment journey.

Advisors may use the event to strengthen their relationships and build client/prospect confidence in Dimensional's way of investing. Audience interaction is encouraged.

This event is intended for retail clients and their advisors.







Lunch & Learns

Lunch & Learns are designed as compact, pop-in sessions for financial professionals to gain timely insights on key investment themes, with opportunities to explore different strategies and solutions available for client portfolios. These interactive settings offer a chance to connect with Dimensional speakers and peers to exchange perspectives, and attendees will walk away with actionable items and important updates.

Specialty Conferences

Our Specialty Conferences offer a wide array of content from institutional investing, practice management topics, 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 of Dimensional's investment approaches. These unique events happen annually both in our offices and virtually.







Annual Institutional Symposium

The Annual Institutional Symposium is our largest institutional event of the year, designed to bring together institutional investment professionals from around the world to share their thoughts and ideas. Attendees will hear the latest thinking from leading academics, industry experts, and Dimensional leaders on a range of topics from the economy and markets to the latest academic research in finance and more.

Deals & Succession Conference

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.





Practice Management Symposium

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

Dimensional US Events: January-June

Please note dates may be subject to change.

DATE	EVENT	LOCATION	CE AVAILABLE
Jan 20	Foundations Conference	Virtual	*
Jan 21	Investor Symposium	Virtual	
Jan 27–28	Applied Investments Conference	Santa Monica	*
Feb 3–4	Applied Investments Conference	Austin	*
Feb 10	Foundations Conference	Charlotte	*
Feb 11	Applied Communications Workshop	Charlotte	
Feb 17	Lunch & Learn	Dallas	*
Feb 18	Lunch & Learn	Houston	*
Feb 23	Foundations Conference	Scottsdale	*
Feb 24–25	Communications Masterclass	Scottsdale	
Feb 26	Investor Symposium	Scottsdale	
Mar 4	Applied Investments Conference	San Diego	*
Mar 10–11	Deals & Succession	Charlotte	
Mar 30	Foundations Conference	Santa Monica	*
Mar 31	Applied Communications Workshop	Santa Monica	

Please note CE available conferences are subject to change.

DATE	EVENT	LOCATION	CE AVAILABLE
Apr 1	Foundations Conference	Santa Monica	*
Apr 7	Foundations Conference	Atlanta	*
Apr 8	Foundations Conference	Fort Lauderdale	*
Apr 21	Foundations Conference	Columbus	*
Apr 22	Applied Investments Conference	Ann Arbor	*
Apr 27–28	Annual Institutional Symposium	Austin	
May 6	Foundations Conference	Virtual	*
May 19–20	Investor Symposium	Austin	
May 26	Foundations Conference	Austin	*
May 27	Applied Communications Workshop	Austin	
Jun 9–10	Applied Investments Conference	Charlotte	*
Jun 15	Applied Investments Conference	Portland	*
Jun 16	Applied Communications Workshop	Seattle	
Jun 23	Lunch & Learn	Salt Lake City	*
Jun 24	Foundations Conference	Denver	*

Please note CE available conferences are subject to change.

Dimensional US Events: July-December

Please note dates may be subject to change.

DATE	EVENT	LOCATION	CE AVAILABLE
Jul 14	Foundations Conference	Santa Monica	*
Jul 15	Applied Communications Workshop	Santa Monica	
Jul 20	Lunch & Learn	Virginia Beach	*
Jul 21	Applied Investments Conference	Washington, DC	*
Jul 27	Foundations Conference	Chicago	*
Jul 28–29	Communications Masterclass	Chicago	
Jul 30	Investor Symposium	Chicago	
Aug 4	Foundations Conference	Charlotte	*
Aug 5	Applied Communications Workshop	Charlotte	
Aug 25	Foundations Conference	North Bay Area	*
Aug 26	Foundations Conference	South Bay Area	*
Sep 8	Foundations Conference	Virtual	*
Sep 9	Investor Symposium	Virtual	
Sep 15–16	Applied Investments Conference	Santa Monica	*
Sep 21	Applied Investments Conference	Philadelphia	*
Sep 22	Foundations Conference	Boston	*
Sep 23	Applied Communications Workshop	Boston	

Please note CE available conferences are subject to change.

DATE	EVENT	LOCATION	CE AVAILABLE
Oct 12	Lunch & Learn	Des Moines	*
Oct 13	Foundations Conference	Minneapolis	*
Oct 14	Applied Communications Workshop	Minneapolis	
Oct 19	Lunch & Learn	Long Island	*
Oct 20	Lunch & Learn	Connecticut	*
Oct 21	Lunch & Learn	New Jersey	*
Nov 3–4	Practice Management Symposium	Austin	
Nov 9	Foundations Conference	Santa Monica	*
Nov 10	Applied Communications Workshop	Santa Monica	
Nov 17–18	Communications Masterclass	Charlotte	
Dec 1	Foundations Conference	Austin	*
Dec 2	Applied Communications Workshop	Austin	
Dec 8	Foundations Conference	Virtual	*

Please note CE available conferences are subject to change.

2027 Dimensional US Events

Ann Arbor
Atlanta
Austin
Bay Area
Boston
Charlotte
Chicago
Columbus
Connecticut
Dallas
Denver
Des Moines
Ft Lauderdale
Houston
Long Island
Minneapolis
New Jersey
Philadelphia
Portland
Salt Lake City
San Diego
Santa Monica
Scottsdale
Seattle
Virginia Beach
Washington, DC

