



DIMENSIONAL 360®

2025 CONFERENCES AND WORKSHOPS

EMEA

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Benchmark Study	
Firm Metrics	Bottom Quartile 0-25%
AIM Growth Rate	(7%)
Revenue Growth Rate	1%
FTE	14.0
Revenue / FTE	\$320k
Operating Profit	

Results from Dimensional 2023 Global Advisor Benchmark Study, participating firms with >\$1B in 2023 revenue. 204 firms 25-50% quartile, 111 firms >75% quartile.



Welcome

I am pleased to present Dimensional's 2025 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 2025 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 (Dimensional representative).

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

Best regards,

A handwritten signature in black ink, appearing to read 'John S. Romiza'.



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*			✓

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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, with a specific focus on how to communicate effectively with clients and prospects using Dimensional's proprietary 4S Framework™ comprising scripts, stories, sketches and supplements. The programme is designed to help advisers and investment professionals implement powerful ideas and strategies for effective communication into their businesses, with the aim of making complex topics on investing accessible to all.

*Audience: Advisers, Wealth Managers
and Investment Professionals*

Applied Business Strategy Workshop

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

The event 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.

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 <i>Matrix Book</i> 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 was launched in EMEA in 2021 and 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.

Tune Out the Noise

At Dimensional, we often say our story is bigger than the firm itself. It's a story about how finance became a science and challenged the traditional methods of investing. That, in turn, led to the invention of index funds, the founding of Dimensional Fund Advisors and the evolution of client-focused advice—advances that have benefitted generations of investors. Dimensional believes these developments can help even more investors have the experience they deserve. That is why we worked with Academy Award-winning filmmaker Errol Morris on *Tune Out the Noise*. Our hope is that the documentary will show people around the world that there's a better way to invest.

To book a screening, please contact your Dimensional representative.



Dimensional EMEA Events 2025

Please note dates may be subject to change. For the most up to date event information please visit [MyDimensional.com](https://www.mydimensional.com).

DATE	EVENT	LOCATION	CPD AVAILABLE
Jan 15	Annual Market Review	Virtual	*
Jan 16	German Jahresauftakt	Germany	*
Feb 12-13	Foundations Conference	Dimensional London	*
Feb 20-21	German Applied Business Seminar	Germany	*
Mar 5	Irish Science of Investing Conference	Ireland	*
Mar 12-13	Foundations Conference	Dimensional London	*
Mar 13-14	German Foundations Conference	Germany	*
Mar 26	Applied Communications Workshop	Dimensional London	*
Apr 3	Benelux Regional Workshop	Benelux	*
Apr 16	Quarterly Market Review	Virtual	*
May 7-8	Foundations Conference	Dimensional London	*
May 14-15	German Applied Communications Workshop	Germany	*
May 21	Applied Communications Workshop	Dimensional London	*
Jun 11-12	Foundations Conference	Dimensional London	*
Jun 24	Applied Business Strategy Workshop	London	*
Jun 26	German Investment Principles Conference	Virtual	*

DATE	EVENT	LOCATION	CPD AVAILABLE
Jul 16	Quarterly Market Review	Virtual	*
Sep 10-11	Foundations Conference	Dimensional London	*
Sep 17-18	German Applied Business Seminar	Germany	*
Sep 24	Irish Science of Investing Conference	Ireland	*
Oct 1	Applied Communications Workshop	Dimensional London	*
Oct 8-9	Foundations Conference	Dimensional London	*
Oct 8-9	German Foundations Conference	Germany	*
Oct 9	Benelux Regional Workshop	Benelux	*
Oct 22	Quarterly Market Review	Virtual	*
Nov 4	Irish Regional Workshop	Ireland	*
Nov 13	Swiss Investor Symposium	Switzerland	
Nov 26-27	Foundations Conference	Dimensional London	*
Dec 10	Applied Communications Workshop	Dimensional London	*

Please note all events may be subject to change.

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RISKS

Investments involve risks. The investment return and principal value of an investment may fluctuate so that an investor's shares, when redeemed, may be worth more or less than their original value. Past performance is not a guarantee of future results. There is no guarantee strategies will be successful.

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