

# 2025 GLOBAL ADVISOR STUDY

Dimensional’s Global Advisor Study provides advisory firms with strategic insights into their businesses.

Growing organically, managing capacity, and developing top talent continue to drive High Performing Firms.<sup>1</sup> How are these firms tackling these critical areas? What key performance indicators (KPIs) might help inform your own business?

For over a decade, Dimensional’s annual Global Advisor Study has provided insight into these questions and more. The 2025 study includes a specific focus on technology, the client experience, and shaping ownership in your business.

As part of Dimensional 360,\* the Global Advisor Study focuses solely on advisers and business owners, allowing them to assess where they stand in relation to their peers and consider best practices for driving growth and business value. Custom results are delivered to participants in a dynamic dashboard environment.

## Benefits

- Access to key productivity and profitability metrics
- Peer-level insights on adviser business practices
- Detailed average and median compensation data (optional module)
- Detailed income statement analysis (optional module)
- Trend analysis for multiyear participants



## Study Content

This year’s study consists of a core set of questions as well as optional modules focused on income statement, roles and compensation, client experience, equity and ownership, technology, and values-based investment.

**Core Section:** Firms provide information on their businesses, including structure and services, assets under management, staffing, and top firm initiatives. These questions enable time-series analysis and cross-referencing with other topics.

**Income Statement (optional):** This section captures firm revenue and firm expenses in areas such as human capital, technology, business development, and marketing.

**Roles and Compensation (optional):** The study also features an optional compensation module that collects salary and bonus information for all roles, as well as insights on baseline skills and responsibilities for key roles in your firm.

**Client Experience (optional):** Whether you are seeking to retain your existing clients or elevate the experience to drive referrals and growth, this module will provide deep insights on how firms are striving to differentiate themselves and continue to meet the needs of their clients over time.

**Equity and Ownership (optional):** What are ways to structure your equity program? What criteria should you consider when adding partners to the business? Gain insights on how firms are using equity to address succession and top- talent retention goals.

**Technology (optional):** This module examines how firms are leveraging different technology platforms and workflow processes to optimise their business. Understand how firms are utilising technology, AI, and workflow processes to solve business challenges, scale their operations, and more!

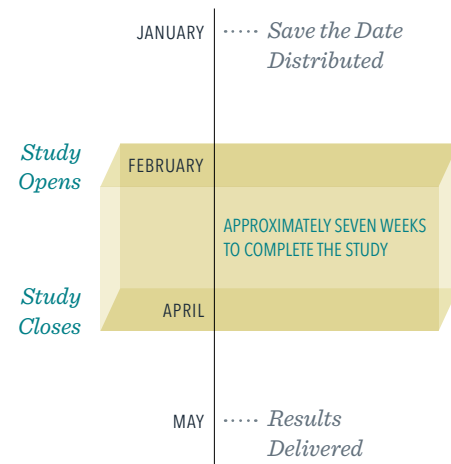
**Values-based Investing (optional):** This refers to decisions made to align an investment portfolio with a person’s beliefs and values. Gain insights on how firms are implementing this, and what changes might be on the horizon.

## How It Works

The Global Advisor Study is executed through a secure online questionnaire. All firms working directly with Dimensional are invited to participate and will receive a preliminary save-the-date email before the study opens, with additional details and the set of questions to review.

If you have questions or need assistance, contact your Regional Director.

### Study Timeline: EMEA



\* Dimensional 360® is a suite of services available to an elite community of financial professionals who work with Dimensional Fund Advisors. Learn more [here](#).

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## Did You Know?

In addition to providing annual benchmarking data through the Global Advisor Study, Dimensional Practice Management also offers firms an exclusive opportunity to evaluate their client experience, measure end clients' sentiments and values, and gauge their referral process through Dimensional's Global Investor Study. To learn more about the Global Investor Study and how to participate, please visit [MyDimensional](#).



Scan QR code to learn more about Dimensional's Global Advisor Study.

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1. Dimensional's Practice Management group uses this term to identify the highest-performing advisory firms by evaluating metrics collected in the annual Global Advisor Study. Each firm is given a percentile rank across the five metrics: revenue growth, client retention, employee retention, profit margin, and revenue per adviser. A firm's score is the average of these five metrics. Firms whose scores are in the top quartile among all firms are considered High Performing Firms. Firms in the other three quartiles are referred to collectively as Other Firms.

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