

Grow Your Business with Dimensional Wealth Models

We have designed the Dimensional Wealth Models with advisors in mind. The Dimensional Wealth Models are strategic asset allocation models composed entirely of Dimensional trusts. Our transparent, research-backed model allocations allow you to streamline your investment process, so you have more time to serve clients and develop your business.

► Scale and Efficiency

Harness Dimensional’s investment expertise while freeing up time to serve clients and strategically manage and grow your business.

► Systematic and Transparent

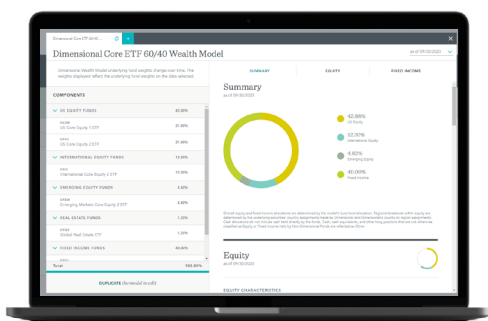
Deliver a systematic, transparent investment approach that’s easy to explain.

► Extensive Support

Access a broad selection of materials and consult with our service team on portfolio matters, client questions, and solutions.

Visit Our Model Centre

You can access a powerful model-building and analysis tool on MyDimensional. The [Model Centre](#) enables you to review and compare characteristics and returns for each model set and create and compare your own custom models.



Model Resources

Dimensional offers professional and client-ready materials to help you integrate our Wealth Models into your business.

Resources include:

- Client-ready brochure
- Fact sheets
- Quarterly update commentary
- Research papers and articles
- Model rebalance notification subscription
- Videos

What’s the Value of Models for Advisors?

A recent study of multiyear survey data from Dimensional’s annual Global Advisor Study suggests that advisory firms that use models tend to grow faster.¹

1. Dai et al. examined five years of data from an annual survey of around 900 US firms that account for about \$250 billion in AUM. In the study, they find that the use of model portfolios and the number of model portfolios are both positively correlated with AUM growth. On average, firms that offer model portfolios have 5.5 percentage points higher AUM growth in the current year compared to firms that don’t. For more information, see Wei Dai, Marco Di Maggio, Kaitlin Hendrix, Wiebke Lamping, Savina Rizova, and Trey Roberts, “What Drives Growth for Financial Advisors? Evidence From a Multi-Year Survey” (white paper, Dimensional Fund Advisors, May 2023).

Model Lineup and Platforms

The models combine a systematic asset allocation framework with daily, active implementation to help investors pursue a wide range of investment goals. Both model sets are designed for total portfolio emphasis on reliable drivers of higher expected returns across equity markets (size, value, and profitability) and fixed income markets (term, credit, and currency of issuance).

The models are generally rebalanced quarterly and available on MyDimensional.com, our secure website. You can also access certain models on other platforms. Individual model set availability and certain model parameters may vary by platform.²

	Core Allocations for a total portfolio emphasis on higher expected returns	Sustainability Allocations that align certain sustainability values with investment goals, focusing on scientific drivers of climate change ³
Model Weights Available		
MyDimensional	●	●
DASH	●	●
Managed Accounts Available		
North Choice Menu	●	
North Federated Menu	●	
HUB24 CHOICE Menu	●	
HUB24 CORE Menu	●	

Dimensional has decades of experience in designing and managing multi-asset solutions. We apply a consistent approach across all of our models while staying responsive to the evolving needs of financial professionals and their clients.

We believe Dimensional Wealth Models can help you deliver effective investment solutions while scaling your business for growth and success.

Learn More

Contact a Dimensional representative or visit the Dimensional Wealth Models Collection on [MyDimensional](https://MyDimensional.com).

2. A cash allocation of up to 2% is included in the models on certain platforms and applied pro rata where included. Additionally, number of model allocations available may vary by platform. Availability as of 30 September 2024.

3. The trusts are designed to incorporate sustainability considerations. Sustainability considerations may vary between trusts. Please consult each Trust's PDS.

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DFA Australia Limited ("Dimensional") makes available certain model portfolios ("Dimensional Models") for informational, illustrative and educational purposes only. The Dimensional Models are provided "as is." Dimensional has no obligation to continue to maintain or take any other action with respect to the Dimensional Models and may stop providing any update to the Dimensional Models at any time in its sole and absolute discretion. Dimensional is providing information in the form of Dimensional Models as ideas for possible construction of portfolios centered around the Dimensional Trusts and not as financial product advice, recommendations or research. Dimensional is not responsible for models constructed by a user of the Tool ("User-Constructed Models") or any modifications to the Dimensional Models made by a user of the Tool (the Dimensional Models and the User-Constructed Models, and any user modifications thereto, collectively, the "Models"). Dimensional is not responsible for implementing the Models (e.g., selecting brokers, executing trades or seeking best execution).

Dimensional is not providing any investment, tax or financial product advice to any investment professional or their clients, and has no obligation to and will not take into account the tax status, investment objectives, financial situation or needs of any investment professional or their clients when compiling the Dimensional Models. Dimensional is not acting as a fiduciary to any investment professional or their clients, nor is any investment professional or their client entering into any type of advisory or other relationship with Dimensional. The investment decisions made by any investment professional or their clients based on the Dimensional Models provided shall be at the investment professional's or such client's own risk and Dimensional makes no guarantee as to the merits of any Dimensional Model or Dimensional Trusts selected for a Model. The Dimensional Models are not intended as a sufficient basis on which to make an investment decision. Certain investments included in the Models may not be suitable for investors, nor do they represent a complete investment program.

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Any indices shown are intended for comparative purposes only and may differ significantly from the Models. Dimensional makes no representations as to the appropriateness of any of the indices in comparison to the Models. The risk factors, benefits and disadvantages of the indices and Models may vary greatly and should be considered alongside fund characteristics, holdings and past performance figures stated. Although the Models were created using information developed internally and/or obtained from sources believed to be reliable, Dimensional does not guarantee the accuracy, adequacy or completeness of such information.

The Dimensional research and portfolio management teams (the "Model Team") developed the Dimensional Models. The Model Team, with oversight from Dimensional's Investment Committee, generally expects to select funds for the Models managed by Dimensional ("Dimensional Trusts") without considering the universe of funds sponsored by persons not affiliated with Dimensional or its affiliates ("Third Party Funds"), even though there may or may not be Third Party Funds that may be more appropriate for inclusion in such Dimensional Models. To the extent a user implements all or part of a Model, this will generate advisory and other fees for Dimensional or its affiliate, and the management fees of Dimensional Trusts may be higher than fees charged by Third Party Funds. The Dimensional Models asset allocation represent the selected target asset mix as determined by the Model Team and as of the date it is provided.

The risks of the Dimensional Models are subject to the risk of the Dimensional Trusts, which can be found in the applicable Dimensional Trust Product Disclosure Statement (PDS). The selection of Dimensional Trusts and the allocation and reallocation of Dimensional Model assets may not produce a desired result.

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