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# 2025 EVENTS BROCHURE

AUSTRALIA & NEW ZEALAND

Years of  
Innovation in  
Australia





# 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.

From foundational concepts to the deep insights of leading academics and practitioners, Dimensional's events for more than two decades have been finding a strong and growing community of intermediaries seeking to serve Australian and New Zealand investors at the highest level.

Drawing from a deep pool of experts and thought leaders, the events aim to shed new light on the issues that are challenging our industry. 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.

Each event explores a spectrum of topics, grouped under investments, client communication and business strategy. We're confident that in our comprehensive schedule, you will find an event that best meets your individual needs as a financial professional and those of your firm or institution.

For more information about these forums or to request an invitation, please contact your Dimensional representative.

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

Best regards,



**Nathan Krieger**  
Head of Client Group, Australia  
and Vice President

# 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 Dimensional's education 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 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—built around practice management ideas 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
Investment Essentials Masterclass	✓	✓	
Foundations Conference	✓	✓	✓
New Zealand Symposium	✓	✓	✓
Practice Management Symposium		✓	✓
Sustainability Conference	✓		
Deals & Succession Conference			✓
Advanced Conference	✓	✓	✓
Communications Workshop		✓	

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

# Investment Essentials Masterclass

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## *Virtual event only*

This virtual masterclass gives you the opportunity to hear from Dimensional's investment and research professionals about Dimensional's investment philosophy and how it translates into real-world solutions.

See how we design and trade our trusts and how we differ to other approaches. Learn about how to communicate this approach to your clients.



# Foundations Conference

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## *In-Person event only*

The Foundations Conference gives you the opportunity to explore Dimensional's unique investment philosophy and approach to markets in an engaging environment, providing valuable time to network with likeminded peers.

Discover Dimensional's enduring relationship with the advisor community. Deep dive into the research that underpins our investment philosophy. See how we design and trade our trusts and how we differ to other approaches. Hear from and interact with Dimensional's investment and research professionals. Learn about key considerations for building global portfolios, and how to communicate this approach to your clients.

# Deals and Succession Conference

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*By invitation only / In-person event only*

This one-day event 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.

# Advanced Conference

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*By invitation only / In-person event only*

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

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

# Communications Workshop

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*In-person event only*

The 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.

# Practice Management Symposium

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*By invitation only / In-person event only*

This symposium helps build the practice management acumen of attendees and provides insights into new practice management ideas and best practices.

This event explores the opportunities to position your business for future growth and provides a forum among like-minded individuals to share experiences, workshop ideas and develop solutions.



# New Zealand Symposium

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*By invitation only / In-person event only*

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

# Sustainability Conference

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*In-person and virtual event*

Dimensional's Sustainability Conference is a unique event built to showcase timely insights from subject matter experts in academia, as well as the firm's Responsible Investment team. This conference will provide a great continuous learning opportunity with the ability to ask questions of the presenters.

# Dimensional Quarterly Webcast Program

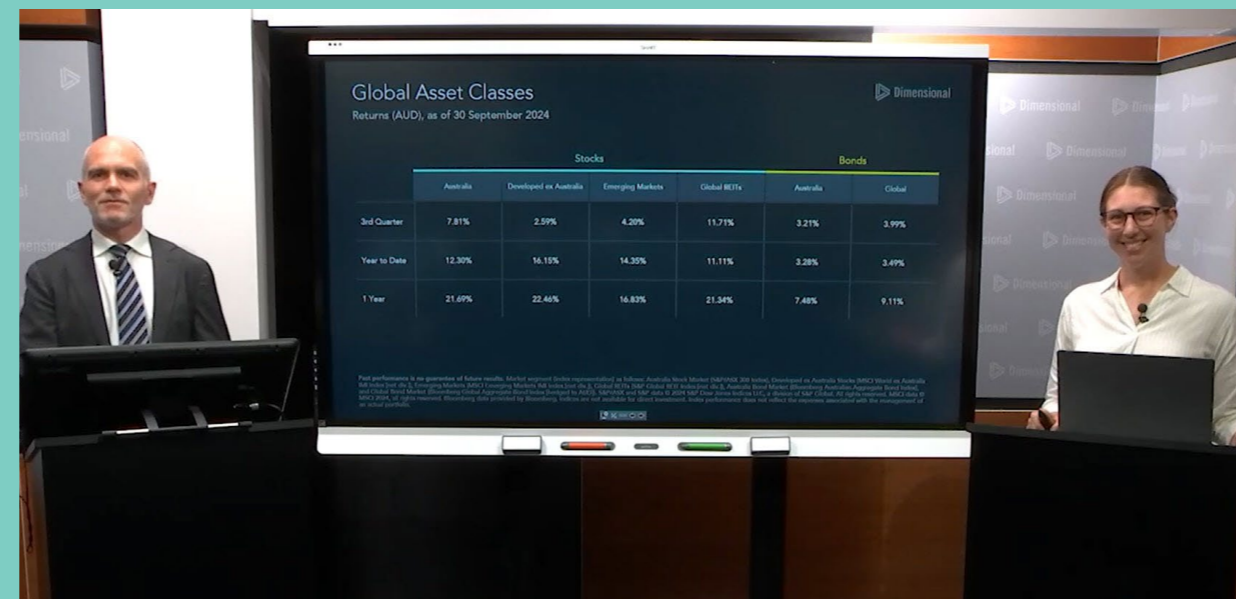
*Each quarter from our broadcast studio, we will bring you insights on:*

## Quarterly Market Update

Dimensional's investment and client communications teams review the global financial markets, Dimensional portfolio returns and significant events during the period.

## Practice Management

Dimensional's practice management and global client group teams feature principle, strategies, and data driven insights for advisory businesses.



## Dimensional Investing

Dimensional's investment specialists offering a deeper perspective on research, investment performance, strategy implementation, and global market events.

## Effective Client Communication

Dimensional's client communications team focuses on a range of different topics using Dimensional's 4S Framework and aims to provide professionals with greater confidence in their conversations with clients.

## Insights From a Thought Leader

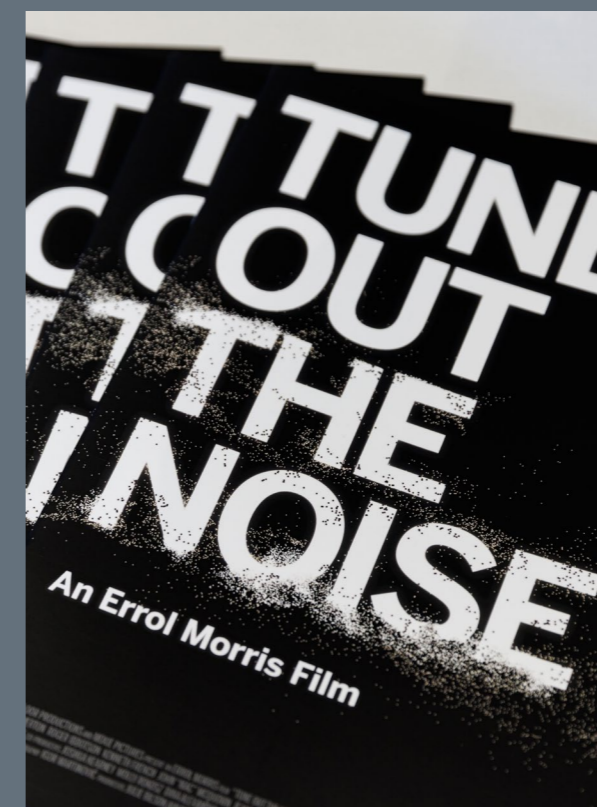
Dimensional Leaders and industry experts share their strategic perspectives on the economy, markets and investing.

For more information on our upcoming webcasts visit [mydimensional.com](https://mydimensional.com).

## 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.





# Upcoming Conferences

*Please note dates may be subject to change.*

DATE	EVENT	LOCATION
05 MAR	Foundations Conference	Melbourne, VIC
01 APR	Foundations Conference	Brisbane, QLD
29/30 APR	Investment Essentials Masterclass	Virtual
08 MAY	Foundations Conference	Perth, WA
20 MAY	Foundations Conference	Sydney, NSW
28/29 MAY	Practice Management Symposium*	Sydney, NSW
26 JUN	New Zealand Symposium*	Auckland, NZ
30 JUL	Foundations Conference	Melbourne , VIC

*\*By invitation only*

DATE	EVENT	LOCATION
12 AUG	Foundations Conference	Wellington, NZ
14 AUG	Foundations Conference	Auckland, NZ
03/04 SEP	Investment Essentials Masterclass	Virtual
09 SEP	Foundations Conference	Adelaide, SA
30/31 OCT	Advanced Conference*	Melbourne, VIC
11 NOV	Foundations Conference	Melbourne, VIC
25 NOV	Foundations Conference	Sydney, NSW

*\*By invitation only*



**Dimensional**