

## GLOBAL INVESTOR STUDY

Insights into your firm—from a client's point of view

**As your firm grows and evolves, knowing how your clients feel and what they value most is more important than ever.**

The Global Investor Study helps you gather direct feedback on how your firm can deliver a better client experience and use the insights gained to better identify the clients you most want to replicate.

You can gain deeper insights into your clients' views on a range of issues, including:

- ▶ What they want in an advisory relationship
- ▶ How they measure your value
- ▶ Their overall satisfaction with your business and advisor attributes
- ▶ Why some clients refer and others do not

### Benefits

Participation in the study can help advisory firms:

- ▶ Evaluate their value offering from their clients' viewpoint
- ▶ Identify ways to improve service efficiency
- ▶ Gauge client expectations in the current financial and market environment
- ▶ Assess client willingness to refer, as indicated by their Net Promoter Score (NPS)
- ▶ Discover areas of opportunity and potential risk
- ▶ Use the insights gained to develop a target client profile for their business development strategy

### Study Content

This customisable client feedback survey begins with a set of standard demographics questions, then allows for a selection of questions from the following categories. All responses are completely anonymous.

**Demographics:** Though not required to answer, all clients are asked demographics questions, including their age, gender, asset level, employment status, and more.

**Value and Services:** These questions help advisors get a closer look into what really matters to their clients and how they have benefited from their received services.

**Client Engagement and Interaction:** How often are you meeting with your clients? Does that align with what they want or need? What is their preferred method to meet or communicate? Utilise these questions to find out.

**Investments:** These questions remain high level, capturing attitudes toward investing, rather than opinions on investment vehicles.

**Referrals:** Focusing on organic growth? The questions in this section target advisor introductions and referrals.

**Open-Ended Questions:** Firms can ask up to two open-ended questions, where clients can respond in paragraph form. These questions can be custom.

### How It Works

The Global Investor Study is executed through a secure online questionnaire. All firms working directly with Dimensional are invited to participate and can do so at any point during the year.

Ready to participate? Want to learn more? Reach out to your Regional Director for next steps.

1. **Request Invitation:** Reach out to your Regional Director for more resources or to register.
2. **Register for the Global Investor Study:** Complete a brief survey capturing your firm's details.
3. **Customise Your Survey:** Determine which questions to ask your clients.
4. **Test Your Survey:** Ensure your survey displays and functions according to your expectations.
5. **Craft Your Communications:** Using provided templates, prepare invitation, reminder, and thank-you emails to send to your clients.
6. **Send Your Survey:** Copy and paste the provided URLs of your customised survey into your client communications.
7. **Access Your Results:** Log on to your reporting dashboard to review your clients' responses alongside peer data.



### Did You Know?

In addition to providing data through the Global Investor Study, Dimensional Practice Management also offers firms an opportunity to evaluate their business, compare themselves to like-minded peers, and assess best practices for driving growth and business value through Dimensional's **Global Advisor Study**. To learn more about the Global Advisor Study and how to participate, please visit [MyDimensional](#).

---

## *Interested in learning more?*

Visit MyDimensional at: [my.dimensional.com/global-investor-study](http://my.dimensional.com/global-investor-study)

---

### **FOR PROFESSIONAL USE ONLY. NOT FOR USE WITH RETAIL INVESTORS OR THE PUBLIC.**

The information in this material is intended for the recipient's background information and use only. It is provided in good faith and without any warranty or representation as to accuracy or completeness. Information and opinions presented in this material have been obtained or derived from sources believed by Dimensional to be reliable, and Dimensional has reasonable grounds to believe that all factual information herein is true as at the date of this material. It does not constitute investment advice, a recommendation, or an offer of any services or products for sale and is not intended to provide a sufficient basis on which to make an investment decision. Before acting on any information in this document, you should consider whether it is appropriate for your particular circumstances and, if appropriate, seek professional advice. It is the responsibility of any persons wishing to make a purchase to inform themselves of and observe all applicable laws and regulations. Unauthorized reproduction or transmission of this material is strictly prohibited.

Dimensional accepts no responsibility for loss arising from the use of the information contained herein.

This material is not directed at any person in any jurisdiction where the availability of this material is prohibited or would subject Dimensional or its products or services to any registration, licensing, or other such legal requirements within the jurisdiction.

"Dimensional" refers to the Dimensional separate but affiliated entities generally, rather than to one particular entity. These entities are Dimensional Fund Advisors LP, Dimensional Fund Advisors Ltd., Dimensional Ireland Limited, DFA Australia Limited, Dimensional Fund Advisors Canada ULC, Dimensional Fund Advisors Pte. Ltd., Dimensional Japan Ltd., and Dimensional Hong Kong Limited. Dimensional Hong Kong Limited is licensed by the Securities and Futures Commission to conduct Type 1 (dealing in securities) regulated activities only and does not provide asset management services.

### **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.**

### **AUSTRALIA**

In Australia, this material is provided by DFA Australia Limited (AFSL 238093, ABN 46 065 937 671). It is provided for financial advisors and wholesale investors for information only and is not intended for public use. No account has been taken of the objectives, financial situation or needs of any particular person. Accordingly, to the extent this material constitutes general financial product advice, investors should, before acting on the advice, consider the appropriateness of the advice, having regard to the investor's objectives, financial situation and needs.

### **NEW ZEALAND**

This material has been prepared and provided in New Zealand by DFA Australia Limited, (incorporated in Australia, AFS License No.238093, ABN 46 065 937 671). This material is provided for financial advisers only and is not intended for public use. All material that DFA Australia Limited provides has been prepared for advisers, institutional investors and clients who are classified as Wholesale investors under the Financial Markets Conduct Act 2013. This material does not give any recommendation or opinion to acquire any financial advice product, and is not financial advice to you or any other person.

#### **AMERICAS**

Austin, Charlotte, Santa Monica, Toronto, Vancouver

#### **EUROPE**

Amsterdam, Berlin, Dublin, London, Munich

#### **ASIA PACIFIC**

Hong Kong, Melbourne, Singapore, Sydney, Tokyo

[dimensional.com](http://dimensional.com)

