Dimensional

THE WOMEN & WEALTH COMMUNITY

Since 2015, Dimensional has been bringing financial advisors together to share insights on women and wealth. While industry studies highlight the increasing economic power of women, our view is that the wealth management industry can do more to serve this diverse client base. That's why Dimensional is committed to exploring how we can help advisors offer women a better investment experience.

WEBCASTS

Dimensional offers live webcasts on women's financial needs to advisors and financial professionals. The webcasts feature Dimensional leaders, advisors and financial professionals in the community. Topics include how to work with different demographics, creating interconnected content that resonates with women investors, practice management and more.

VIRTUAL WORKSHOPS

These 90-minute, interactive online sessions explore insights from the community and provide advisors and financial professionals with opportunities to share their thoughts. Past topics have included:

- Working with different demographics of women including divorced women, widows and professional women
- Charitable giving
- Caregiving
- Hosting client events

FOUNDATIONS WORKSHOPS

These full-day, in-person conferences focus on communicating with and marketing to women. Small groups of advisors and financial professionals explore questions such as:

- Is serving women different? What common financial needs/hurdles do women face and how are you accounting for them in financial plans?
- How are you building more meaningful relationships in client meetings?
- What resources, such as blogs, books, podcasts or client events, are you creating to connect with your clients, prospects and centers of influence (COIs) outside of client meetings?

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CONVERSATION CIRCLES

Dimensional hosts conversation circles designed to help advisors and financial professionals see the end-client's perspective. A conversation circle can foster bonds and trust with clients, prospects and COIs; deepen relationships; and create a closer community. The format allows participants time for self-reflection as well as learning from the group through intentional sharing and listening. Among the many topics covered is the "Money Conversation"—an exploration of early money memories; how spending, saving, and investing relate to your values; and changes you might like to make to your money mindset.

CONVERSATION CIRCLE WORKSHOPS

These workshops give advisors and financial professionals the tools and resources they need to host their own conversation circles with clients, prospects and COIs about money and create impactful experiences about other topics of interest.

STUDY GROUPS

By invitation only, these small, member-led groups bring together advisors who are focusing their practice on specific client segments.

FIRM-SPECIFIC ADVISOR/END-CLIENT EVENTS

Advisor/end-client events are typically customised sessions designed to help firms address the needs that are most important to their practice, employees or clients.