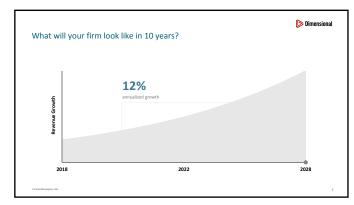
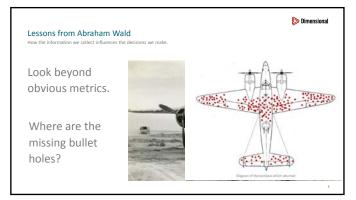


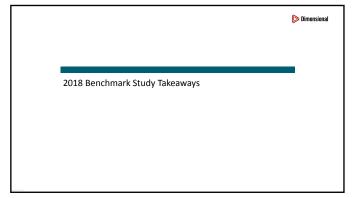
Vision for a Capital City	Dimensional
	AM .
THE REPORT OF THE PARTY OF THE	
	Dimensional
Agenda 1. 2018 Benchmark Study: Understanding Your Business	
2. 2017 Investor Survey: Understanding Your Clients	
I	
	Dimensional
What is your expected annualized revenue grow rate, including market like returns?	wth
rate, moraling market me returns:	

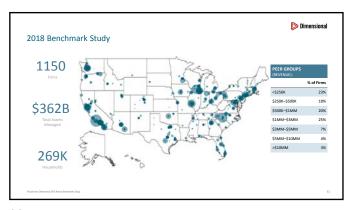




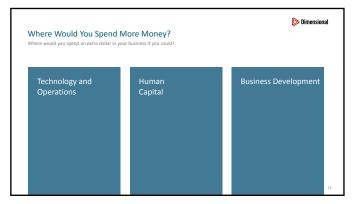


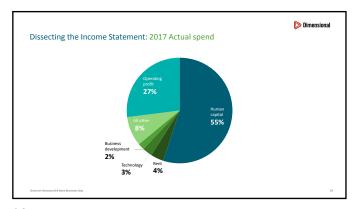
	Dimensional
What are the keys to running a successful	
advisory firm?	
	9

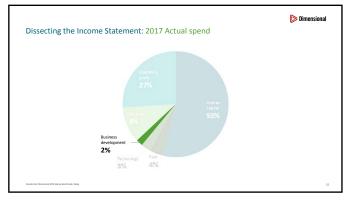


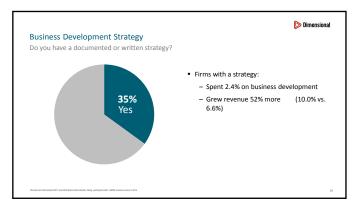


		Dimension
Top Challenges What are the top three challer three years?	nges that you are either currently	facing or expect to face in the next
Technology and Operations:	Human Capital:	Business Development:
	Recruiting and hiring employees	Converting prospects to clients
Systematizing workflow processes	Developing a succession plan	Implementing a business development strategy
Managing compliance and regulatory changes	Developing employees	Differentiating firm from competitors



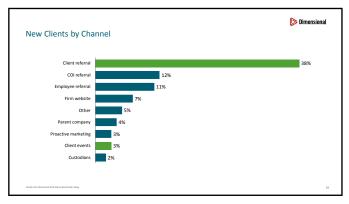


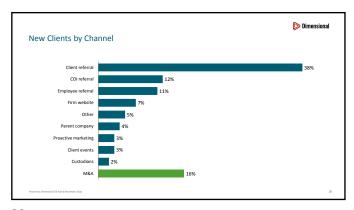




		Dimensional
Most Common Business Develop		
	Most	
	Common	
Events	61%	
Social media/blog	54%	
Email campaigns	43%	
Structured referral process	28%	
Paid advertising	24%	
Guest column, radio/TV appearances	14%	
Direct mail campaigns	11%	
No business development activities	14%	
Results from Dimensional 2017 Advisor Elevahronics Study, participants with +9500K zersual revenue in 2014		17

			Dimensiona
Most Common Business Developme	nt Activities		
	Most	Most	
	Common	Effective	
Events	61%	30%	
Social media/blog	54%	13%	
Email campaigns	43%	7%	
Structured referral process	28%	26%	
Paid advertising	24%	4%	
Guest column, radio/TV appearances	14%	3%	
Direct mail campaigns	11%	2%	
No business development activities	14%	N/A	
Results from Dimensional 2017 Advisor Benchmarks Study, participants with - 9550K serval revenue in 2016			





Dimension	nal
On average, how many new clients do you expect a senior advisor to bring on each year?	
	<u> </u>
	A
21	

Prospect to Client

20

Prospects met with per advisor

Conversion rate

Studies Immediately Analysische Studies and perspect differ and removal 20

22

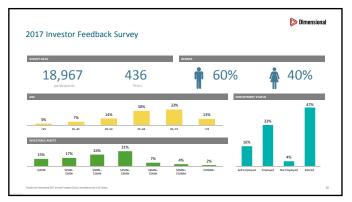


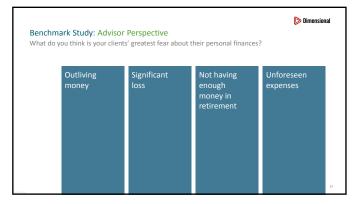
What is the one thing you would change about your overall experience with your advisor?

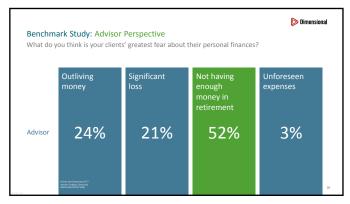
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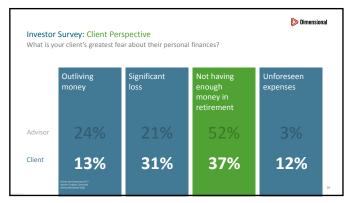
"I would not change a thing. I have been with my advisor for 21 years. Over that time I have developed a warm and trusting relationship with them. It is most comforting to work with people who really care about their clients."

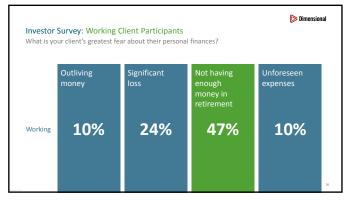
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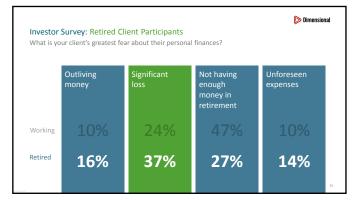






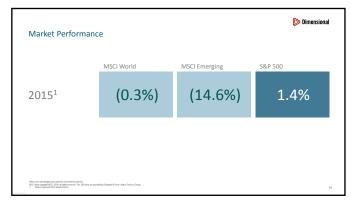


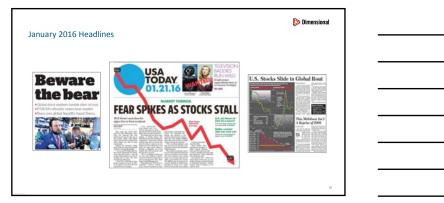


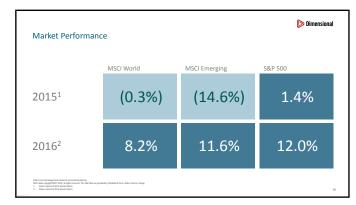










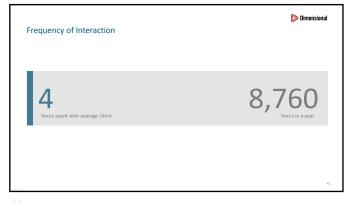






	Dimensional
Communicating with Clients	
- Frequency	
- Content	
- Website	

Frequency of Interaction: Client Perspective		Dimensional
How many times per year do your clients want to talk to you?	3.9	
Nauk to Groning 200 kent feeda s Sery		40



Frequency of Interaction	Dimensional
4 0.05%	
	e.

Frequency of Interaction: Client Perspective

What percentage of your clients do not want to talk to you?

1596

43

Frequency of Interaction: Advisor Perspective

How many times per year do you talk with your clients?

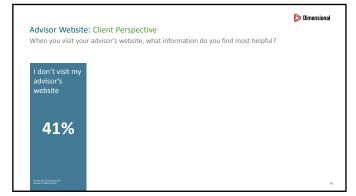
Only 9% of firms are conducting meetings virtually.

Delivering Content: Client Pe Regarding my personal finances, I the following medium:		n delivered through	Dimensional
	Face-to-face or phone	Hard copy/ mail	Email or website
Performance reports	13%	33%	54%
Market news	6%	7%	87%
Educational materials	4%	11%	85%
Results from Dimensional AVCI framester Foodback Sciency			45

Dimensio			
	n delivered through		Delivering Content: Client Regarding my personal finances, the following medium:
Email or website	Hard copy/ mail	Face-to-face or phone	
54%	33%	13%	Performance reports
87%	7%	6%	Market news
85%	11%	4%	Educational materials
	11%	4%	Educational materials

	Dimensional
Advisor Website	
What is the role of your firm's website?	
	47

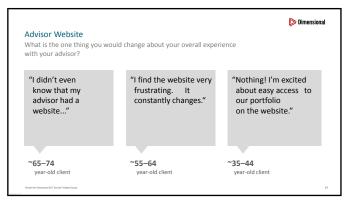
Advisor Website: Advisor Perspective	Dimensional
Approximately what percentage of your clients do you think visit your website on at least a quarterly basis?	17%
Straight the Chromister 2017 Anklar Structural A Cody	a



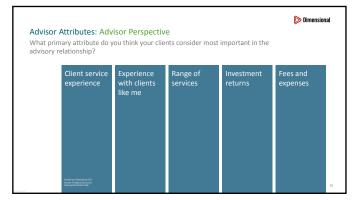


Advison	Mahaita, Advia	au Davenastina			Dimension	nal
	Advisor Website: Advisor Perspective What do you think clients find most important on your website?					
	Services offered	Information about their investments	Our firm's investment philosophy	Team Bios	News about the markets	
Advisor	21%	23%	16%	23%	11%	
	Security from Dimensional 2017 Advicer Gent Insulation Study					51

					Dimension	nal
Advisor Website: Client Perspective What do you think clients find most important on your website?						
,			,			
	Services offered	Information about their investments	Our firm's investment philosophy	Team Bios	News about the markets	
Advisor	21%	23%	16%	23%	11%	
Client	2%	36%	6%	2%	11%	
	Security from Dimensional 2017 Additor Secolomator Study					5



		Dimensional
Measuring Value		

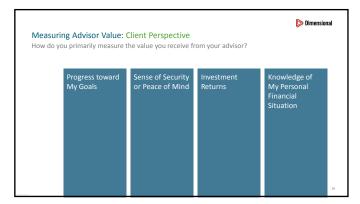


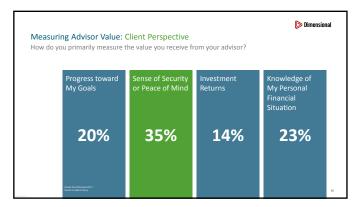
Advisor Attributes: Advisor Perspective What primary attribute do you think your clients consider most important in the advisory relationship?						
	Client service experience	Experience with clients like me	Range of services	Investment returns	Fees and expenses	
Advisor	47%	33%	11%	5%	3%	
1000	Results from Dimensional 2017 Its motor Fredbuck Survey and Advisory Senchman Study					56

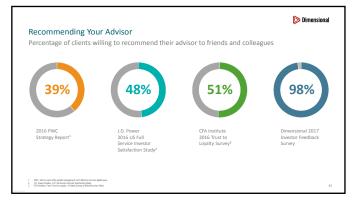
Advisor	Attributes: Clie	nt Parchactive			Dimension	nal
Advisor Attributes: Client Perspective Choose the attribute you consider most important in your advisor relationship.						
	Client service experience	Experience with clients like me	Range of services	Investment returns	Fees and expenses	
Advisor	47%	33%	11%	5%	3%	
Client	31%	26%	6%	32%	4%	
	Sesuits from Dimensional 2017 Insector Feedback Survey and Advisory Sentamonic Study					57

Dimensional

How do clients primarily measure your value?



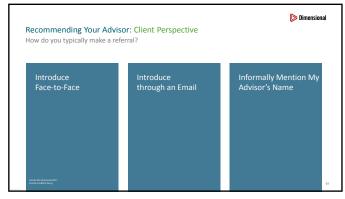




Recommending Your Advisor

Over the past 12 months, what percentage of clients report that they referred someone to their advisor?

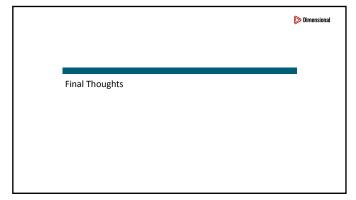
based on the based of the street of th





Years working with firm	Would you recommend?	Have you referred anyone?	
<1 Year	97%	41%	52% of advisors wait
1–2 Years	97%	55%	at least one year before asking for
3–9 Years	98%	56%	referrals.
10+ Years	99%	51%	

Mo	ost Satisfied with Referral P	rocess (Advisors)	Dimen:	sional
	ms rating their referral process ef		7	
	83%	14	78%	
	Communicated to	Referrals received	Referral	
	clients how to make an introduction	per advisor	conversion rate	
Results in	fora Dimensional 2017 Advisor Senchmarks. Study , padiciganis with +5500K sensal revenue in 2016.			66
66				



What is the one thing you would change about your overall experience with your advisor?

"Nothing comes to mind. If they	
could do away with uncertainty, I	
would ask for that"	
	,