

Dimensional's 2017 Global Investor Feedback Survey Finds Peace of Mind Tops List When Investors Measure the Value of Advice

- Sense of security/peace of mind ranks first when investors measure the value they receive from their advisor relationship.
- Client experience matters—and investors are not solely focused on investment returns.

AUSTIN, TEXAS, 27 SEPTEMBER 2017 — A new survey from Dimensional Fund Advisors finds investors place a high value on the sense of security they receive from their financial advisor relationships. In one of the largest studies of its kind, the firm surveyed almost 19,000 investors globally to help the advisors who work with Dimensional better understand what is important to their clients. The results reveal that investors are not solely focused on investment returns or statement balances, with peace of mind and working with an advisor who understands their personal situation ranking higher.

Peace of Mind and the Value of Advice

When asked how they primarily measure the value received from their advisor, the majority of investors say their sense of security is most important to them:

- Sense of security/peace of mind (35%)
- Knowledge of my personal financial situation (23%)
- Progress toward my goals (20%)
- Investment returns (14%)

“Peace of mind may be attributed to many aspects of an advisor relationship, and in our view it is an outcome of advisors helping investors feel prepared by setting the right expectations,” said Dave Butler, Dimensional Co-CEO and Head of Global Financial Advisor Services. “We believe the advisors who work with Dimensional create a different experience for their clients. Almost all of the investors surveyed say they would recommend their advisor to others. Clearly, clients of advisors who work with Dimensional feel strongly about their relationships.”

Added David Booth, Dimensional's Founder and Executive Chairman, “In our view, peace of mind is what success is all about. Achieving returns in a way that enables people to relax just a little bit more is very important to us and also to investors.”

Client Experience and Investors' Relationships with Financial Advisors

When asked what attributes they consider most important in their advisor relationships, the experience investors have with their advisor is key. More than half of respondents say client service experience and their advisor's experience with similar clients are paramount. And approximately one-third of investors say returns are most important:

- Investment returns (32%)
- Client service experience (31%)
- Experience working with clients “like me” (26%)
- Range of services (6%)

“Returns matter, but having a plan and remaining disciplined are just as important for long-term investment success,” Butler said. “When investors work with an advisor who has a holistic understanding of their personal situation and can help them stay focused on their long-term goals, we believe they are better positioned to benefit from what the capital markets have to offer.”

The survey also finds that investors of varying demographics are aligned globally in their responses. What matters to investors in the US also matters to investors in Canada, Europe and Australia and New Zealand.

About the Survey

Dimensional launched the Investor Feedback Survey with US investors in 2016 and expanded the survey globally in 2017. Today, the survey is one of the largest of its kind in the industry. During February and March of this year, almost 19,000 investors who are clients of financial advisors who work with Dimensional completed the survey in the US, Canada, Europe, and Australia and New Zealand. Learn more at au.dimensionalfund.com/2017-investor-survey-insights.

About Dimensional

Dimensional Fund Advisors is a leading global investment firm that has been translating academic research into practical investment solutions since 1981. Guided by a strong belief in markets, we help investors pursue higher expected returns through advanced portfolio design and careful implementation. With clients around the world, Dimensional has 12 offices in eight countries and global assets under management of \$675 billion as at 30 June 2017. Learn more at au.dimensionalfund.com.

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