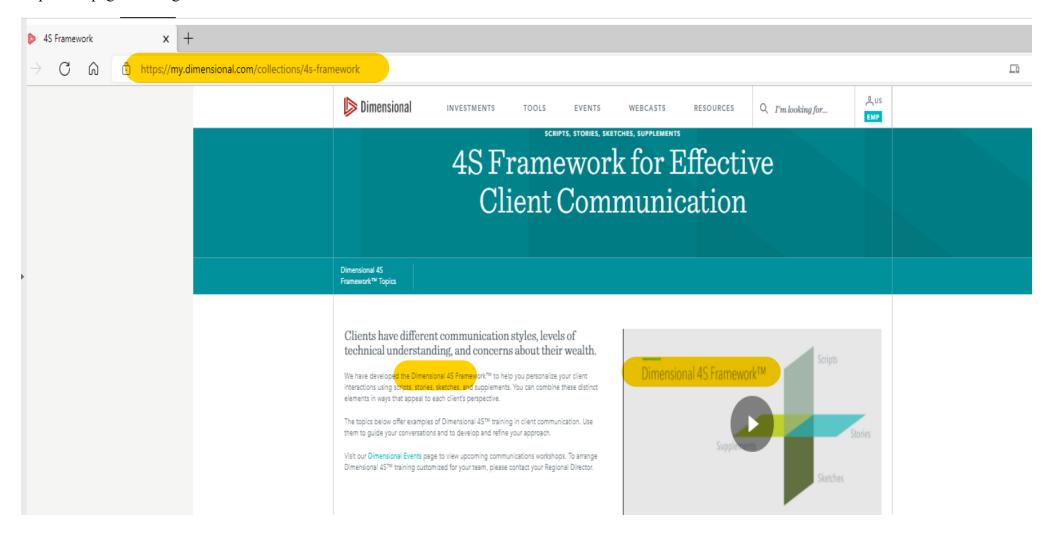


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Dimensional 4S Framework™ Topics

MULTIFORMAT | PROFESSIONAL 45 FRAMEWORK

Crisis of the Day

Investors may become anxious about news on the economy and markets. In extreme cases, they may be tempted to change course on their investment approach. Consider using these 45 elements to reinforce a balanced perspective on highprofile events.

MULTIFORMAT | INTERNAL 45 FRAMEWORK

Internal Training Resources

MULTIFORMAT | PROFESSIONAL 45 FRAMEWORK

Stock Market Conditions

Stock returns are unpredictable. Yet, investors may be reluctant to put money to work in the market when it is at a record high or has recently declined by a relatively large percentage. Use these 45 elements to highlight the challenges with market timing, encourage appropriate expectations of returns, and reinforce a...

MULTIFORMAT | PROFESSIONAL 45 FRAMEWORK

Sustainability Investing

MULTIFORMAT | PROFESSIONAL 45 FRAMEWORK

Value of Advice

Many times, clients want to understand the value they are receiving for the fees they are paying. Learn how to use the 45 Framework to explain an advisor's crucial role in each client's financial journey and highlight the value of objective, clientfocused advice.

MULTIFORMAT | PROFESSIONAL 4S FRAMEWORK

Global Diversification

Clients may question the benefit of holding foreign assets. This may stem from their home country market's recent strong performance relative to other markets, or may simply reflect a preference for investments in local, recognizable companies. Use these 45 elements to communicate the potential long-term...









