

## 'Communicating Investment Principles (aka A Different Way to Invest'

by Aaron Alley, CFP, Regional Director – Dimensional Fund Advisors

The presentation describes the role of information, expectations, and competition in setting prices of publicly traded securities and discusses the main investment approaches informed by the mispricing vs. fair pricing views. The session documents the challenges of both conventional management and indexing in terms of diversification, turnover, trading costs, and performance and features research documenting conventional equity manager performance. The session concludes with an overview of Dimensional's approach to applying market pricing in its investment strategies.

As a regional director in Dimensional's Financial Advisor Services Group, Aaron Alley is responsible for oversight of the firm's conference and event experience. In this role, he helps drive the strategy around advisor education, conference content, speaker training and industry event participation.

Before joining Dimensional, Aaron was a financial advisor on a private wealth management team at Morgan Stanley Smith Barney in Los Angeles. Prior to becoming an advisor, he was an assistant vice president and analyst at Citigroup Private Bank. A CRP professional, Aaron earned his BA in economics from the University of Illinois.