
EXCELLENCE THROUGH HUMAN DYNAMICS

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Just last year, we launched the Advisor Solutions program to help advisors engage more effectively with their existing and prospective clients. This blog post will touch on the importance of effective leadership in an organization.

Solving the Mystery

Many professionals in the world of finance struggle to achieve the full potential of their organizations, teams or even themselves as individuals. We're talking about intelligent, hard-working and well-intentioned people, so the problem isn't one of brains, ambition or values. Instead, it derives from unflexed muscles that have never been needed.

Like doctors, scientists and coders, finance professionals can achieve great success based on their individual drive and talents and rise to levels of substantial impact and responsibility without working with a team or leading one. Too often, these people then hit a wall because changes in role or industry dynamics require them to leverage human dynamics that they've never built the muscles for. Some see the challenge but struggle to find the right tools, while others have a blind spot because after all they've achieved in "hard" quantitative/technical stuff, they dismiss the "soft" stuff related to people—when sometimes that's the hardest stuff of all. This is where we can help.

In my time as mission commander in the #1 fighter squadron in the Navy, I witnessed the powerful impact delivered by world-class leadership from the amazing people I worked for and with and the culture of excellence it drives. As Director of Leadership and Organizational Effectiveness at WisdomTree, I have leveraged insights from those 10 years in the Navy and in the 20 years since in business and academia to make leadership a competitive advantage at WisdomTree. We understand the challenges financial advisors and their leaders experience when it comes to human dynamics and have developed programs as part of our Advisor Solutions platform to support valued advisors in building the same muscles we have found useful inside WisdomTree and with advisors we have helped in the past.

Leadership as a Force Multiplier

World-class organizations do not view leadership as the status of a few but as a set of capabilities that enable people at all levels to influence others to action. Navy fighter squadrons, SEAL teams and top professional athletes adapt and thrive in changing circumstances thanks to the understanding that, at any point in time, different people will have the most useful information, insights and ideas needed for mission success. Leadership skills don't take out terrorists or put points on the board just as they

don't convince an investor to trust us with their life savings, but a team armed with them will apply all of their technical knowledge to far greater effect, multiplying the effectiveness of all other skill sets. Effective leadership gets the best ideas identified and executed, increases a team's capabilities over time and motivates members who will never want to leave and serve as your best recruiting tools for the talent of tomorrow.

WisdomTree Can Help You Develop This Force Multiplier on Your Team

No two organizations are the same, and we approach each of the financial professionals we support with an eye on their unique circumstances. Some have organizational challenges they would like help overcoming, others are reconfiguring their organizations into new or different kinds of teams while others feel strong but want to get stronger and equip leaders and teams to thrive in the future. As you think about your circumstances, consider these questions:

1. Do meetings leave us feeling time was well-spent, with more solutions than frustrations?
2. Do we make and execute decisions with the speed, quality and shared commitment we would hope for?
3. Do people demonstrate the drive and initiative we would hope to see given how much effort leaders make to guide and motivate them?
4. Do members of our newly formed team work together with an effectiveness that delivers on the potential that made us come together in the first place?
5. Do our oldest and youngest team members collaborate in ways that set us up for success as clients' assets move across generations?
6. Do we have the emerging leadership bench to take us to the next level and sustain our legacy through the next generation?

If your answers to all of the above are an emphatic "you bet!" then you are a rare and impressive team—well done! If not, you're in the majority and we can help. It's natural for intelligent and logic-driven leaders to focus their energies on the "hard stuff" of business and dismiss the "soft stuff" of human dynamics as easy or irrational. As someone whose professional life has focused first on blowing things up and then on hard quantitative analysis, I caution them that they neglect the soft stuff at their peril; lava is soft, but it will burn your house down.

How to manage human dynamics is now part of WisdomTree's [Advisor Solutions platform](#), designed to help financial advisors grow their business.

[Financial advisors, read more on ways to improve your business.](#)

For standardized performance and the most recent month-end performance click [here](#) NOTE, this material is intended for electronic use only. Individuals who intend to print and physically deliver to an investor must print the monthly performance report to accompany

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