



WisdomTree Provides Total Portfolio Solutions to Empower New and Deeper Advisor Relationships

Comprehensive suite of solutions allows WisdomTree to work with financial advisors to deliver scalable portfolios to their clients.

NEW YORK, July 2, 2024 (Business Wire) – WisdomTree, Inc. (NYSE: WT), a global financial innovator, today introduces Portfolio Solutions, a WisdomTree Asset Management, Inc. service to empower new and deeper relationships with investment advisors. Whether opting for self-constructed model portfolios or third-party model portfolio providers, Portfolio Solutions offers advisors a robust, scalable, and efficient framework for portfolio delivery.

Portfolio Solutions enables advisors to leverage WisdomTree’s model portfolio and research expertise to help advisors make informed choices on how they deliver and construct portfolios for their clients so they can spend more time scaling and growing their businesses. Portfolio Solutions is comprised of three distinct offerings to help advisors, which include:

For advisor-built portfolios:

- **Portfolio Consultations:** Offers a personalized in-depth evaluation of an advisor’s model portfolios, including individual model portfolio composition analysis, stress testing, examination of holdings and overlaps, and more.

For outsourced portfolios*:

- **CIO-Managed Model Portfolios:** Provides access to WisdomTree’s CIO-Managed Model Portfolios designed to satisfy a wide array of client investment goals. Advisors can implement these model portfolios themselves, via model market centers, or on third-party platforms.
- **Shared CIO:** Enables advisors to collaborate with WisdomTree’s dedicated Model Investment Team to build and manage model portfolios for the advisor’s clients, which includes the option to delegate trading, rebalancing, and tax optimization tasks.

Portfolio Solutions seeks to provide potential benefits for advisors. It helps advisors manage and implement asset allocation decisions, employ a consistent investment and client communication process, save time and resources, and make their practice more valuable. A growth opportunity for WisdomTree, Portfolio Solutions allows us to add substantial value to the advisor’s investment process that the advisor can follow in providing investment advice to its clients.



“More and more, advisors are seeking help regarding their portfolios, and WisdomTree’s goal is to be their strongest partner in the delivery and management of their portfolios and growing their business,” said Thomas Skrobe, Head of Product Solutions at WisdomTree. “We’re excited to provide an offering that enables advisors to collaborate with WisdomTree to help deliver portfolios for their clients so they could spend more time building their businesses and deepening client relationships. We believe that providing a full range of portfolio services is a growth opportunity for the advisors we serve and well-positions us to provide timely insights and drive incremental flows.”

The introduction of the Model Portfolio filter tool marks the first enhancement under Portfolio Solutions, showcasing WisdomTree’s commitment to improving portfolio management and advisor support services. The Model Portfolio filter tool can help advisors find a WisdomTree CIO-Managed Model Portfolio that is most suitable for their client’s needs by offering them the ability to filter by investment objective, risk profile, single or multi-asset class, region, and platform.

Further information on Portfolio Solutions can be found [here](#).

WisdomTree’s models business currently has a milestone AUM, with \$3.5 billion in assets, as of April 26, 2024 – and its momentum is building. Today, there are roughly 2,000 advisors in the U.S. with at least one account that uses WisdomTree managed models. That number more than doubled in 2023 with over 1,000 advisors added in the past 12 months. WisdomTree expects to continue to grow its accessible market to 80,000 advisors by the end of 2024 (up from 70,000 today) by securing new relationships with additional wealth management firms. The firm is also prioritizing deepening their wallet share with the over 2,000 advisors who use WisdomTree managed models today and looks to add another 1,000 new advisors using WisdomTree’s models by the end of 2024.

WisdomTree expanded the Portfolio Solutions team with the strategic new hire of Samuel Rines, Macro Strategist at WisdomTree, providing advisors with geopolitically risk-aware portfolios that aim to provide unique market exposure across asset classes and geographies to help clients navigate through uncertainty. This is an example of how WisdomTree continues to grow and add top talent to our Portfolio Solutions business. Insights from Rines can be found [here](#).

**References to CIO (Chief Investment Officer), “CIO-Managed”, “Shared CIO” are meant as a general reference to WisdomTree Model Portfolio subscriptions, consultation regarding WisdomTree Model Portfolios, and WisdomTree Model Portfolios that may be customized to*



firm-specific objectives or unique firm-specific investment needs (“custom model portfolios”), and WisdomTree is not acting in an investment advisory, fiduciary or quasi-fiduciary capacity in connection therewith. Such material, and any assistance provided as described herein, including portfolio construction, WisdomTree Model Portfolios, custom model portfolios, asset allocation stress testing, assessments, discussions, output or other assistance (whether by WisdomTree personnel or digital tools) are (i) for information only and are not intended to provide, and should not be relied on for, tax, legal, accounting, investment or financial planning advice, (ii) not personalized investment advice or an investment recommendation from WisdomTree, and (iii) intended for use only by a financial professional, with other information, as a resource to help build a portfolio or as an input in the development of investment advice for its own clients. Such financial professionals are responsible for making their own independent judgment as to how to use such information.

WisdomTree Funds are distributed by Foreside Fund Services, LLC.

Thomas Skrobe is a registered representative of Foreside Fund Services, LLC.

For Financial Advisors: WisdomTree Model Portfolio information is designed to be used by financial advisors solely as an educational resource, along with other potential resources advisors may consider, in providing services to their end clients. WisdomTree’s Model Portfolios and related content are for information only and are not intended to provide, and should not be relied on, for tax, legal, accounting, investment or financial planning advice by WisdomTree, nor should any WisdomTree Model Portfolio information be considered or relied upon as investment advice or as a recommendation from WisdomTree, including regarding the use or suitability of any WisdomTree Model Portfolio, any particular security or any particular strategy.

For Retail Investors: WisdomTree’s Model Portfolios are not intended to constitute investment advice or investment recommendations from WisdomTree. Your investment adviser may or may not implement WisdomTree’s Model Portfolios in your account. The performance of your account may differ from the performance shown for a variety of reasons, including but not limited to: Your investment adviser, and not WisdomTree, is responsible for implementing trades in the accounts; differences in market conditions; client-imposed investment restrictions; the timing of client investments and withdrawals; fees payable; and/or other factors. WisdomTree is not responsible for determining the suitability or appropriateness of a strategy based on WisdomTree’s Model Portfolios. WisdomTree does not have investment discretion and does not place trade orders for your account. This material has been created by WisdomTree and the information included herein has not been verified by your investment adviser and may differ from information provided by your investment adviser. WisdomTree does not undertake to provide impartial investment advice or give advice in a fiduciary capacity.



Further, WisdomTree receives revenue in the form of advisory fees for our exchange traded funds and management fees for our collective investment trusts.

WisdomTree Digital is not a bank and does not itself take deposits. Demand deposit accounts made available to you as a WisdomTree Prime user are provided by Stride Bank N.A., Member FDIC. Digital assets held in WisdomTree Digital accounts are not legal tender and are not covered by FDIC protections. The WisdomTree Prime Visa Debit card is issued by Stride Bank N.A., Member FDIC, pursuant to a license from Visa USA Inc.

Digital assets (e.g., bitcoin and ether) are considered to be highly speculative, involve a high degree of risk and have the potential for loss of the entire investment. Digital assets are subject to a number of risks, including price volatility. Transactions in digital assets may be irreversible, and accordingly, losses due to fraudulent or accidental transactions may not be recoverable. Legislative and regulatory changes or actions at the state, federal, or international level may adversely affect the use, transfer, exchange and value of virtual currency.

References to “digital gold” refer to the WisdomTree Gold Token, a digital token recorded on the blockchain representing electronic document of title to physical gold. The price of gold does fluctuate and may be affected by numerous factors including supply and demand, the global financial markets and other political, financial, or economic events, which may negatively impact gold prices and the value of a WisdomTree Gold Token.

A blockchain is an open, distributed ledger that digitally records transactions in a verifiable and immutable (i.e., permanent) way using cryptography. A distributed ledger is a database in which data is stored in a decentralized manner. Cryptography is a method of storing and transmitting data in a particular form so that only those for whom it is intended can read and process it. A blockchain stores transaction data in “blocks” that are linked together to form a “chain”, and hence the name blockchain. Blockchain technology is a relatively new and untested technology, with little regulation. Blockchain systems could be vulnerable to fraud, particularly if a significant minority of participants colluded to defraud the rest. Potential risks also include vulnerability to theft, or inaccessibility, and future regulatory developments could affect its viability.

There are risks associated with investing, including possible loss of principal.

Investors and their advisors should consider the investment objectives, risks, charges and expenses of the funds included in any Model Portfolio carefully before investing. This and other information can be obtained in the Fund’s prospectus or summary prospectus by visiting wisdomtree.com/investments. Please read the prospectus carefully before you invest.



About WisdomTree

WisdomTree is a global financial innovator, offering a well-diversified suite of exchange-traded products (ETPs), models, solutions and products leveraging blockchain technology. We empower investors and consumers to shape their future and support financial professionals to better serve their clients and grow their businesses. WisdomTree is leveraging the latest financial infrastructure to create products that provide access, transparency and an enhanced user experience. Building on our heritage of innovation, we are also developing and have launched next-generation digital products, services and structures, including digital or blockchain-enabled mutual funds and tokenized assets, as well as our blockchain-native digital wallet, WisdomTree Prime®.*

*The WisdomTree Prime digital wallet and digital asset services are made available through WisdomTree Digital Movement, Inc. (NMLS ID: 2372500) and WisdomTree Digital Trust Company, LLC, in select U.S. jurisdictions and may be limited where prohibited by law. WisdomTree Digital Trust Company, LLC is chartered as a limited purpose trust company by the New York State Department of Financial Services to engage in virtual currency business. Visit <https://www.wisdomtreeprime.com> or the WisdomTree Prime mobile app for more information.

WisdomTree currently has approximately **\$109 billion** in assets under management globally, as of June 20, 2024.

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WisdomTree® is the marketing name for WisdomTree, Inc. and its subsidiaries worldwide.

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