WisdomTree PORTFOLIO SOLUTIONS

Empower Your Practice with Tailored Portfolios, Expert Insights, and Strategic Support

With WisdomTree Portfolio Solutions, we offer multiple ways to help you with your portfolios — all based on your preferences. If you prefer to continue managing your current portfolios, you can leverage our consultants to achieve specific client goals, or you have the option to tap into our Model Portfolio Investment Team by selecting a pre-set model portfolio or co-creating a custom portfolio tailored to your specific needs. We're here to support you and your practice with the following offerings:

PORTFOLIO CONSULTATIONS

Your Portfolio, Our Insights

Enhance your current portfolios with our expert insights. Our team conducts comprehensive portfolio reviews and provides unbiased investment recommendations tailored to your unique needs. We offer individual fund analysis, asset allocation strategies, portfolio stress testing and risk assessment.

BENEFITS:

- + Adaptable to changing market conditions
- + Tailored to your needs
- + Impartial insights
- + Ability to pinpoint unforeseen risks
- + Personalized report detailing investment suggestions

MODEL PORTFOLIOS

WisdomTree CIO-Managed Portfolios

Explore WisdomTree's comprehensive range of building block sleeves and multi-asset portfolios available to meet a variety of client goals. You can implement them yourself via model market centers or on various third-party platforms.

BENEFITS:

- + Proven track record with a 10-year history
- + Cost-efficient with no additional strategist fees
- + Open architecture
- + Wide range of custom client communication solutions
- + Exclusive access to Siegel-WisdomTree Model Portfolios

CUSTOM MODEL PORTFOLIOS

Shared CIO

Collaborate with our Model Portfolio Investment Team to design bespoke portfolios tailored to your clients' goals. You have the option to delegate trading, rebalancing, and tax optimization tasks for enhanced efficiency.

BENEFITS:

- + Collaboration with and ongoing access to our Model Portfolio Investment Team
- + Custom portfolios with diverse ETF selections, including existing tickers
- + No strategist fees
- + Full suite of custom client communication resources
- + Simplified trading and rebalancing

What makes WisdomTree unique?

ALL THE WAYS WE BRING VALUE TO YOU AND YOUR CLIENTS:

ONGOING PERSONALIZED COLLABORATION

We collaborate with you in the way that best meets the unique needs of you and your clients. We're nimble and flexible and provide you with exclusive access to the investment experts behind our model portfolios.

DEDICATED MODEL PORTFOLIO INVESTMENT TEAM

Our experienced and dedicated team, with the support of Professor Siegel, incorporates global research insights leveraging the WisdomTree investment philosophy.

RIGOROUS INVESTMENT APPROACH WITH PROVEN TRACK RECORD

Our investment approach, which has a proven track record over the last 10 years, is designed to enhance cost efficiency and optimize performance potential.

CUSTOMIZED CLIENT EXPERIENCE

We offer the ability to white label end-client collateral, including factsheets and commentaries, to simplify and enhance client communication and education that you need to succeed.

COMPREHENSIVE ADVISOR SOLUTIONS

We offer a suite of workshops, presentations and practice management resources to help you run and grow your practice.

Schedule your introductory call today.

EMAIL: wtpg@wisdomtree.com

VISIT: WisdomTree.com/PortfolioSolutions

WISDOMTREE®

IMPORTANT INFORMATION

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.

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 Model Portfolios and any related content are intended for informational use only and are not intended to provide investment or financial planning advice by WisdomTree. WisdomTree Model Portfolio information should not 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.

Model rebalancing and trading will be provided by Adhesion Wealth, a provider of outsourced investment management solutions, giving their advisor clients direct access to a platform that will deliver a more customizable approach with advisor input. WisdomTree's Portfolio and Growth Solutions enables advisors to prioritize customizable brand practices and factsheets, investment design of models, and efficiencies across implementation, trading, and tax transitions, which can serve as a springboard towards their growth.

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, if available, the summary prospectus by visiting wisdomtree.com/investments for WisdomTree Funds. Visit the applicable third-party website for non-WisdomTree funds. Please read the prospectus or, if available, the summary prospectus carefully before you invest. WisdomTree Asset Management, Inc. does not endorse and is not responsible or liable for any content or other materials made available by other ETF sponsors.

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

Jeremy Siegel serves as Senior Economist to WisdomTree, Inc., and its subsidiary, WisdomTree Asset Management, Inc. ("WTAM" or "WisdomTree"). He serves on the Model Portfolio Investment Committee for the Siegel-WisdomTree Model Portfolios of WisdomTree, which develops and rebalances WisdomTree's Model Portfolios. In serving as an advisor to WisdomTree in such roles, Mr. Siegel is not attempting to meet the objectives of any person, does not express opinions as to the investment merits of any particular securities and is not undertaking to provide and does not provide any individualized or personalized advice attuned or tailored to the concerns of any person.

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The reference to "Shared CIO" is 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 be 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.

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