



## **WisdomTree Cements Additional Third-Party Relationships, Continuing Focus and Momentum**

*Modern Alpha® ETF Model Portfolios available on platforms of Carson Group, Riskalyze, Kwanti ETFLogic and Orion*

New York, NY – (GlobeNewswire) – July 27, 2020 – WisdomTree (NASDAQ: WETF), an exchange-traded fund (“ETF”) and exchange-traded product (“ETP”) sponsor and asset manager, today announced that the WisdomTree [Modern Alpha® ETF Model Portfolios](#) have been added to the platforms of numerous leading advisor fintech firms including Carson Group, Riskalyze, Kwanti, ETFLogic and Orion.

Discussing the product, process and support that WisdomTree provides to advisors, Tom Skrobe, Head of Product Solutions at WisdomTree, said: “We have a robust and rigorous institutional investment process, we are yielding model portfolios that address challenges for advisors and their clients, and we build an extensive advisor support platform that advisors have gravitated toward to help grow their business and service clients. So, it’s a given that we are seeing exceptional growth and adoption of our Modern Alpha® ETF Model Portfolios by many of the big players.”

Having WisdomTree’s Modern Alpha® ETF Model Portfolios available through these leading firms is a testament to WisdomTree’s robust capabilities to create open architecture models in-house that combine the potential of active approaches with the discipline of passive methods, to serve thousands of advisors across the country.

WisdomTree Modern Alpha® ETF Model Portfolios are index-centric and designed to be strategic, while also incorporating tactical tilts based on market conditions. WisdomTree’s approach seeks to ensure that there are a range of model portfolios for advisors to consider in serving the varied needs of investors, from the conservative to the aggressive.

*WisdomTree Modern Alpha® ETF Model Portfolios are now available on the following platforms for advisors:*

### **Carson Group Open Architecture Collaboration**

WisdomTree is pleased to announce that we have collaborated with the Carson Group to build open architecture model portfolios available on their platform. Carson Group serves financial advisors and investors through its businesses including Carson Wealth, Carson Coaching and Carson Partners.

### **Riskalyze Model Market Center: “The Partner Store”**

Riskalyze is a fintech company that provides software as a service to financial advisors in the U.S. and has grown rapidly since its founding in 2011, serving over 20,000 advisors. WisdomTree is part of the Riskalyze Asset Manager program where advisors can seamlessly access WisdomTree’s Model Portfolios.

### **Kwanti Model Marketplace**

Kwanti was founded after the 2008 crisis with the goal of providing superior metrics and visuals to manage investment risk and performance. Since then, the firm has evolved to encompass portfolio analytics that advisors need for model construction, client portfolio reviews and proposal generation.



Kwanti is used daily by hundreds of advisory firms and now offers access to WisdomTree's robust selection of institutional-quality model portfolios.

### **ETFLogic Logicly Model Portfolio Marketplace**

Founded in 2017, ETFLogic is an investment analytics provider focused on providing fund screening and portfolio construction tools to help advisors navigate the ETF markets and beyond. ETFLogic's Logicly model marketplace is a centralized hub for financial advisor education and provides information and analysis on the top strategies from top thought leaders such as ETF issuers and third-party model providers – and now includes WisdomTree's Model Portfolios. Advisors can integrate models from the marketplace and compare them against or overlay them onto their current portfolios.

### **Orion Communities**

Orion Communities is an investment model marketplace that marries convenient access to leading strategist models with the flexibility to make more intelligent, personalized investment decisions for each client. With greater investment options spanning brand, boutique, and emerging strategists, Orion advisors can easily tailor investment strategies to investors' unique goals, appetite for risk and comprehensive financial plans, as part of Orion's tech-enabled fiduciary process that powers the advisor-client relationship: Prospect, Plan, Invest, Achieve. WisdomTree is excited to join Orion's growing platform, which supports more than 2,000 advisory firms holding a combined \$1 trillion in assets under administration.

### *Model Portfolios a Strategic Focus for WisdomTree*

Jarrett Lilien, President and Chief Operating Officer at WisdomTree, said: "Model Portfolios are a key focus for WisdomTree, and relationships with third parties give our model portfolios increasing visibility with vast advisor networks. Every new relationship adds another log to the fire and builds our momentum. We have a strong pipeline and are excited about what's in-store for the future."

Over the last five years, advisors have witnessed the growing availability of third-party model portfolios through a number of sources, including those developed by strategists, asset managers and home offices. And according to WisdomTree's recent study on the adoption and perceptions of Model Portfolios, the majority of advisors believe models will not only help them scale their business (88%) and improve efficiencies (92%), but also help improve the services they provide to clients (88%) AND assist with potential increased regulatory scrutiny (90%).

**The arrangements referenced above are memorialized via separate licensing agreements with each platform provider whereby WisdomTree has provided a license to the platform provider for displaying the model portfolios on the platform to be accessed by advisors in their own discretion. Information regarding each platform provider has been provided by the platform provider and WisdomTree makes no representations, warranties, endorsements or recommendations regarding any platform provider, its products or services.**

**There are risks involved with investing, including possible loss of principal. This information and the model portfolios are not personalized investment advice or an investment recommendation from WisdomTree, and are intended for use only by a third party financial advisor, 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 advisors are responsible for making their own independent judgment as to how to use this and all model portfolio information. WisdomTree does not have investment discretion over or place trade orders for any portfolios or accounts of advisors or investors derived from model portfolio information.

*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 by visiting [www.wisdomtree.com](http://www.wisdomtree.com) for WisdomTree Funds. Please read the prospectus carefully before you invest in a fund. WisdomTree Asset Management Inc. does not endorse and is not responsible for or liable for any content or other materials made available by other ETF sponsors.*

Unrestricted architecture, open-architecture or unrestricted universe means that a model portfolio may include ETFs other than WisdomTree ETFs. However, the model portfolios are expected to include a substantial portion of WisdomTree ETFs.

The term Fintech (Financial Technology) refers to software and other modern technologies used by businesses that provide automated and improved financial services.

Software as a service (SAAS) is a method of software delivery and licensing in which software is accessed online via a subscription, rather than bought and installed on individual computers.

WisdomTree Funds are distributed by Foreside Fund Services, LLC, in the U.S. only.

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#### **About WisdomTree**

WisdomTree Investments, Inc., through its subsidiaries in the U.S. and Europe (collectively, "WisdomTree"), is an exchange-traded fund ("ETF") and exchange-traded product ("ETP") sponsor and asset manager headquartered in New York. WisdomTree offers products covering equities, fixed income, currencies, commodities and alternative strategies. WisdomTree currently has approximately \$60.6 billion in assets under management globally. For more information, please visit [www.wisdomtree.com](http://www.wisdomtree.com) or follow us on Twitter [@WisdomTreeETFs](https://twitter.com/WisdomTreeETFs).

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

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