



WisdomTree and Professor Jeremy Siegel of The Wharton School Collaborate to Launch Model Portfolios Designed to Challenge Traditional 60/40 Portfolio Approach

Industry-first model portfolios using Professor Siegel's legendary approach to stocks, and investing for the long run

The Siegel-WisdomTree Global Equity Model Portfolio and the Siegel-WisdomTree Longevity Model Portfolio provide advisors with multi-asset, open architecture model portfolios

New York, NY – (GlobeNewswire) – January 30, 2020 – WisdomTree (NASDAQ: WETF), an exchange-traded fund (“ETF”) and exchange-traded product (“ETP”) sponsor and asset manager, today – in collaboration with Jeremy Siegel, WisdomTree’s Senior Investment Strategy Advisor and Professor of Finance at The Wharton School at the University of Pennsylvania – announced the launch of two unique multi-asset, open architecture model portfolios: the **Siegel-WisdomTree Global Equity Model Portfolio** and the **Siegel-WisdomTree Longevity Model Portfolio**, available first to advisors through the Model Market Center™ on the TD Ameritrade Institutional platform.

New Era for Investors

When speaking with their advisors, investors tend to care about a few key issues, such as maintaining or improving their lifestyle throughout retirement without running out of money, ensuring their legacy with family and philanthropy and managing taxes. With an individual’s general life expectancy increasing, investors face two potential challenges: lower interest rates and lower U.S. equity returns.

Tom Skrobe, WisdomTree Head of Product Solutions, said: “Investors have been subscribing to Professor Siegel’s tried-and-tested approach to investing for decades. WisdomTree’s deepened relationship with Prof. Siegel and involvement in our Asset Allocation Team led to a set of globally diversified model portfolios allowing advisors to easily access Prof.’s Siegel and WisdomTree’s vision designed to address the current challenges of lower interest rates and lower U.S. equity returns against the backdrop of longer lifespans and retirement needs.”

Attributes of the Siegel-WisdomTree Model Portfolios

- More heavily allocated to equities (“stocks for the long run”) in seeking to mitigate the longevity short-fall risk;
- Equity allocation to more dividend / income / yield-oriented equities, which seeks to accomplish two simultaneous goals: income and outperformance potential;
- An all-ETF portfolio structure helping to optimize the tax-efficiency of the portfolio; and
- Siegel-WisdomTree Global Equity Model Portfolio: 0.29% composite model portfolio net expense ratio; Siegel-WisdomTree Longevity Model Portfolio: 0.25% composite model portfolio net expense ratio.

The collaboration with Professor Siegel brings a unique solution to advisors who are trying to balance the current income needs with the longevity risk of their clients. The Siegel-WisdomTree Model Portfolios were designed to outperform a traditional 60% Equity/40% Fixed Income portfolio in a risk-conscious manner by structurally allocating more toward equities over fixed income and tilting toward factors such as dividend yield and low P/E ratios in seeking higher income generation and



outperformance potential. The models are strategic in nature but also reflect tactical tilts based on market conditions.

Professor Jeremy Siegel's most widely read work, "Stocks for the Long Run," provided investors with a new paradigm for investing and building wealth in the 21st century. His long-standing relationship with WisdomTree dates back over 10 years as the firm's Senior Investment Strategy Advisor where he continues to advocate that stocks may be volatile in the short-term, but over full market cycles and through time, equities have outperformed all other major asset classes. Today, WisdomTree and Professor Siegel have come together to apply these principles to these Siegel-WisdomTree Model Portfolios that advisors can offer to clients.

Professor Siegel said, "The investment implications of a lower for longer interest rate environment are profound. Specifically, it means that moderate risk investors – the typical "60/40" investors – will frequently not be able to generate sufficient yield out of their income portfolios to maintain their desired lifestyle. To put it more bluntly, for many investors, a "60/40" portfolio is not going to get the job done, especially as many will have longer life expectancies. My collaboration with WisdomTree brings a unique solution to advisors who are trying to balance current income needs with the longevity risk of their clients."

Investors should carefully consider the investment objectives, risks, charges and expenses of the Funds before investing. To obtain a prospectus for WisdomTree Funds containing this and other important information, please call 866.909.9473 or visit WisdomTree.com to view or download a prospectus. Investors should read the prospectus carefully before investing.

There are risks associated with investing, including the possible loss of principal. Foreign investing involves currency, political and economic risk. Funds focusing on a single country or sector and/or funds that emphasize investments in smaller companies may experience greater price volatility. Investments in emerging markets, real estate, currency, fixed income and alternative investments include additional risks. Dividends are not guaranteed, and a company currently paying dividends may cease paying dividends at any time. Diversification does not eliminate the risk of experiencing investment losses. Due to the investment strategy of certain Funds, they may make higher capital gain distributions than other ETFs. Please see each Fund's prospectus for a discussion of risks.

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Jeremy Siegel serves as Senior Investment Strategy Advisor to WisdomTree Investments, Inc., and its subsidiary, WisdomTree Asset Management, Inc. ("WTAM" or "WisdomTree"), and serves on the Asset Allocation committee of WTAM, which develops and rebalances WisdomTree's model portfolios. In serving as a consultant to WisdomTree in such roles, Prof. 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.

The Siegel-WisdomTree Longevity Model Portfolio seeks to address increasing longevity by shifting the focus to potential long-term growth through higher stock allocation versus more traditional “60/40” portfolios.

The Siegel-WisdomTree Model Portfolios 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 information. Siegel-WisdomTree Model Portfolios are not intended to constitute investment advice or investment recommendations.

The Siegel-WisdomTree Model Portfolios are provided “as-is,” without any warranty of any kind, express or implied. Information and other marketing materials provided to you by WisdomTree or any third party concerning a Siegel-WisdomTree Model Portfolio, including allocations, performance and other characteristics, may not be indicative of an investor’s actual experience from an account managed in accordance with a Siegel-WisdomTree Model Portfolio’s strategy.

WisdomTree Funds are distributed by Foreside Fund Services, LLC, in the U.S. only.
Thomas Skrobe is a registered representative of Foreside Fund Services, LL.

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About WisdomTree

WisdomTree Investments, Inc., through its subsidiaries in the U.S., Europe and Canada (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 \$63.4 billion in assets under management globally. For more information, please visit www.wisdomtree.com or follow us on Twitter [@WisdomTreeETFs](https://twitter.com/WisdomTreeETFs).

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