

Tax-Smart WisdomTree Model Portfolio Technology Launches

Collaboration with 55ip offers valuable tax exposure insights for portfolio transitions

NEW YORK, February 16, 2021 -- WisdomTree Investments, Inc. (NASDAQ: WETF), an exchange-traded fund (“ETF”) and exchange-traded product (“ETP”) sponsor and asset manager, announced today its model portfolio collaboration with 55ip, a financial technology company, is live.

With the needs of the 2021 investor at the forefront, WisdomTree’s model portfolios combined with 55ip’s technology enable advisors to transition clients into diversified WisdomTree model portfolios while managing capital gains. Driven by 55ip’s tax-smart investment strategy engine, the new offering uses intelligent automation to help advisors unlock efficiencies, achieve scale and deliver a more transparent model portfolio selection experience to their clients.

Tom Skrobe, WisdomTree Head of Product Solutions, said, “The investment industry is at an inflection point. Coming out of 2020, with a new administration in place and the idea of a post-pandemic world beginning to take shape, investors are rethinking their investment strategies -- and, by extension, holdings -- in a very comprehensive way. They’re thinking about transitions into new themes and re-assessing existing priorities based on their evolving risk appetite. Tax considerations have long been an obstacle for investors looking to incorporate models into their portfolios -- we’re changing that.”

Through the 55ip integration, advisors and their clients can access:

- ActiveTax Technology®, including tax-smart transition, management (including tax-loss harvesting), and withdrawals combined with WisdomTree model portfolios through the advisor-friendly 55ip solution.
- Automated trading and rebalancing in the 55ip platform, streamlining account management.
- Customized client reporting including Tax Savings Reports that showcase value.

Added Skrobe, “We pride ourselves on a level of agility and innovation matched only by the pioneering mindset of the investor. Aligning the tax implications of conversions with model portfolios in an efficient and transparent manner is the type of innovation that moves the industry needle.”

The solution utilizes WisdomTree’s Modern Alpha® ETF Model Portfolios, first launched in 2013 with growth, income and wealth preservation investment objectives in mind. The Modern Alpha ETF Model Portfolio family combines the opportunities of active management, such as

potential of outperformance against a benchmark, with the benefits of passive management. The Siegel-WisdomTree Model Portfolios, unique multi-asset, open architecture portfolios, are a particularly strong example of the kind of innovation in the Modern Alpha family, as innovative alternatives to the traditional 60% Equity/40% Fixed Income portfolio strategy.

The new solution's onboarding process follows three straightforward steps:

- Advisors select the WisdomTree Modern Alpha® ETF Model Portfolio that best aligns with a client's goals on the 55ip platform.
- Based on the client's portfolio, the solution generates a tax-smart plan to transition the assets to the new model portfolio over time.
- Advisors receive proposal and reporting information to share with clients, helping them understand the potential tax advantages with ongoing, automated tax management.

The solution is currently available to Registered Investment Advisors within the WisdomTree ecosystem and is expected to be expanded in the future to additional channels including independent broker-dealers. For more information, visit wisdomtree.com/55ip.

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The arrangements referenced above are memorialized via a licensing agreement with 55ip whereby WisdomTree has provided a license to 55ip for displaying applicable WisdomTree model portfolios on the 55ip solution to be accessed by advisors in their own discretion. WisdomTree makes no representations, warranties, endorsements or recommendations regarding 55ip, its products or services.

Neither WisdomTree Investments, Inc., nor its affiliates, nor Foreside Fund Services, LLC, or its affiliates provide tax advice. All references to tax matters or information provided are for illustrative purposes only and should not be considered tax advice and cannot be used for the purpose of avoiding tax penalties. Investors seeking tax advice should consult an independent tax advisor.

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.

Open architecture means that a model portfolio may include ETFs other than WisdomTree ETFs.

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 for WisdomTree Funds. Please read the prospectus carefully before you invest in a fund.

Jeremy Siegel serves as Senior Investment Strategy Advisor to WisdomTree Investments, Inc., and its subsidiary, WisdomTree Asset Management, Inc. (“WTAM” or “WisdomTree”). He serves on the Asset Allocation Committee of WisdomTree, which develops and rebalances WisdomTree’s Model Portfolios. In serving as a consultant 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.

WisdomTree Funds are distributed by Foreside Fund Services, LLC, in the U.S. only. Foreside Fund Services, LLC is not affiliated with the other entities mentioned. Thomas Skrobe is a registered representative of Foreside Fund Services, LLC. WTPR-20210210-0105

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 \$68.7 billion in assets under management globally. For more information, please visit www.wisdomtree.com or follow us on Twitter @WisdomTreeETFs.

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

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