INTRODUCING WISDOMTREE PORTFOLIO AND GROWTH SOLUTIONS

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We are excited to introduce an exciting program for RIAs and Independent Advisory Firms, **WisdomTree Portfolio and Growth Solutions.**

Our program is built to help assist advisors in delivering customized portfolios to their clients that help them save time and be more efficient. Advisors will be able to leverage our experienced portfolio consultation and implementation team, supported by rebalancing and trading services through an agreement with Adhesion for their clients' Model Portfolios. Additionally, advisors will have access to a suite of Growth Solutions, including workshops, presentations and practice management experts.

The idea came from listening to advisors consistently tell us the same story.

> *You became an advisor to help others achieve their financial goals. You felt confident you could excel doing it. Naturally, you envisioned that success propelling you to achieve your own business goals.*
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> *That's the way it's supposed to work. But, in reality, you end up wearing a lot of hats and spending too much time each week juggling responsibilities that keep you from serving all the clients you'd like. Without that freedom to prospect and serve more clients, it's difficult to scale your business.*

Our goal with this program is to make you more efficient, help you grow and provide you with a more scalable investment solution for you to deliver to your clients.

Portfolio and Growth Solutions is a solution that provides you with transparent and objective-based Model Portfolios. Your updated Model Portfolios are customized based on your inputs and desired outcomes for your clients while providing you with efficiency and scale to manage a successful practice. This bundled set of solutions lets you outsource the customization of your Model Portfolios, access rebalancing and trading services through an agreement with Adhesion and get guidance on growing and managing your practice.

There are three main areas in which this packaged solution can begin supporting your business:

Build	Manage	Grow
A team of specialists collaborates with each advisor to learn their specific objectives and co-create Model Portfolios designed to achieve the advisor's goals, which can, in turn, help advisors address their clients' goals.	WisdomTree, through an agreement with Adhesion, will offer advisors rebalancing and trading services for their Model Portfolios.	Specialists guide and coach the advisor through processes focused on sales, marketing, operations and leadership.

Process

We follow a step-by-step process that ensures we're aligned with you while focusing on best-in-class execution and the goals you have created for your client every step of the way.

Step 1: Introductory call

Learn about us, the team supporting you, and how we'll work together. We'll get a better idea of your current portfolio, your overall expectations and the goals you have for your clients. If it makes sense for both sides to work together, we can move to the next step in the process.

Step 2: Portfolio consultation and findings review

Collaboratively, we discuss various aspects of your business, including desired inputs and outcomes, and work with you to build customized Model Portfolios. We'll review our transparent suggestions with you and help you develop an implementable solution.

Step 3: Onboarding and implementation

The goal is to help you implement your new portfolio, test it before migrating your client accounts and then go live.

Step 4: Growth guidance

Gain access to presentations, workshops and materials on growing your business, building your team, leadership development, research and more.

Step 5: Ongoing management and check-ins

We talk regularly to ensure you get added support if you need it. You move forward knowing your clients' Model Portfolios are rebalanced and traded through your agreement with Adhesion and are managed and rebalanced tax-efficiently. You meet quarterly with our investment team.

We'll be here to support and work with you every step of the way.

For standardized performance and the most recent month-end performance click here NOTE, this material is intended for electronic use only. Individuals who intend to print and physically deliver to an investor must print the monthly performance report to accompany this blog.

View the online version of this article here.

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