



## **WisdomTree and 55ip Collaborate to Deliver Tax-Smart WisdomTree Model Portfolios**

*Automated tax technology enhances portfolio transitions and management*

New York, NY, and Boston, MA - (GlobeNewswire) – October 20, 2020 -- WisdomTree Investments, Inc. (NASDAQ: WETF), an exchange-traded fund (“ETF”) and exchange-traded product (“ETP”) sponsor and asset manager, today announced its collaboration with 55ip, a financial technology company. The joint solution—which uses 55ip’s automated, tax-smart technology—will make it easier for advisors to transition clients into diversified WisdomTree model portfolios with ongoing rebalancing and tax management.

The collaboration combines WisdomTree’s diversified model portfolios with 55ip’s tax-smart investment strategy engine, which uses intelligent automation to deliver a more intuitive model portfolio selection and implementation experience. By bringing these capabilities together, WisdomTree and 55ip are positioned to help advisors run their practices more efficiently and to drive better client outcomes.

Tom Skrobe, Head of Product Solutions at WisdomTree, said, “The industry’s focus is increasingly turning to model portfolios, but the process of moving an existing portfolio into a model has continued to be time-intensive and costly. Our collaboration with 55ip significantly improves that process. Through the 55ip platform integration, advisors will be able to quickly assess the projected cost of the transition, engage in the transition and then manage the portfolio on an ongoing basis, with a high level of efficiency and transparency.”

Through a co-branded experience, advisors will be able to deliver tax-smart transitions, management, and withdrawals, as well as tax benefit reporting. The solution will also provide analytic and proposal tools and is expected to be available to advisors at the end of this year.

Paul Gamble, CEO of 55ip, said, "Tax considerations are one of the most cited barriers to model portfolio transitions—and they’re getting in the way of clients making financial progress. We identified that pain point early and made it our mission to partner with leading asset managers like WisdomTree to offer advisors the tools they need to help clients leverage the power of models, and potentially improve after-tax outcomes. In working with WisdomTree, we’re doing exactly that, with a user experience that we believe sets the bar for the industry."

With 55ip’s existing integrations with major RIA custodians, access to WisdomTree’s model portfolios will be exposed to a new user base. In addition, the solution also will be made available to additional channels, such as independent broker-dealers. For advisors using the platform today, 55ip has helped drive broader usage of models, with approximately double the assets in taxable accounts in models, and

three- to six-times the average account size compared to incumbent platforms where advisors access models.<sup>1</sup>

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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 platform 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 on this site [in this material] 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.

**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 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.

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## About WisdomTree

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<sup>1</sup> Average account balance in models with 55ip as of June 30, 2020.

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 \$62.9 billion in assets under management globally. For more information, please visit [www.wisdomtree.com](http://www.wisdomtree.com) or follow us on Twitter @WisdomTreeETFs.

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

### **About 55ip**

55ip is a financial technology company whose purpose is to break down barriers to financial progress. Financial advisors use 55ip’s tax-smart investment strategy engine to dramatically improve their efficiency and effectiveness. 55ip’s intuitive experience and intelligent automation elevate portfolio design and delivery, helping advisors save time and drive better outcomes for their clients. At the heart of the experience is 55ip’s automated tax technology, which includes tax-smart transitions, management, and withdrawals.

55ip is the marketing name used by 55 Institutional Partners, LLC, an investment technology developer, and for investment advisory services provided by 55I, LLC, an SEC-registered investment adviser.

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