WisdomTree Launches Portfolio and Growth Solutions

New offering built to address the needs of RIAs and IBDs, help scale and grow their business

NEW YORK, April 18, 2022 (GLOBE NEWSWIRE) -- WisdomTree Investments, Inc. (NASDAQ: WETF), an exchange-traded fund ("ETF") and exchange-traded product ("ETP") sponsor and asset manager, announced today the launch of its Portfolio and Growth Solutions. WisdomTree is providing customized portfolio and asset allocation services to support Registered Investment Advisers (RIAs) and independent broker dealers (IBDs) in building, implementing, and managing their client portfolios while providing strategic guidance for advisors to support their business growth.

WisdomTree's asset gathering approach is centered on two primary focuses: large distribution networks where advisors use WisdomTree's Model Portfolios across their book of business, and customized portfolios to RIAs and IBDs that they can use to support a majority of the RIA's or IBD's book of business.

"Investment advisors are constantly in search of levers to efficiently and thoughtfully scale their services but are also prioritizing to provide their clients with efficient investment management services, lowered expenses, and decreased operational complexities," said Thomas Skrobe, Head of Product Solutions at WisdomTree. "While advisors often opt out of outsourcing these services due to their clients' more tailored needs, WisdomTree's Portfolio and Growth Solutions offer customized outsourced portfolios to advisors that enable those advisors to then spend more time on value-add client activity, leading to increased client growth and acquisition of new clients."

WisdomTree's Portfolio and Growth Solutions address advisor needs across three primary pillars:

- **Build: Portfolio Solutions**
    - A team of specialists collaborate with each advisor to learn their specific objectives and create model portfolios designed to achieve the advisor's goals, which can, in turn, help advisors address their clients' goals
- **Manage: Trading Solutions**
    - WisdomTree, through an agreement with Adhesion Wealth, will offer advisors rebalancing and trading services for their clients' model portfolios.
- **Grow: Advisor Solutions**
    - Specialists guide and coach the advisor through processes focused on sales, marketing, operations, and leadership.

Model rebalancing and trading will be provided by Adhesion Wealth, a provider of outsourced investment management solutions, giving their advisor clients direct access to a platform that will deliver a more customizable approach with advisor input. WisdomTree's Portfolio and Growth Solutions enables advisors to prioritize customizable brand practices and fact sheets, investment design of models, and efficiencies across implementation, trading, and tax transitions, which can serve as a springboard towards their growth.

Jarrett Lilien, President and COO of WisdomTree added, "We have seen first-hand the value of increasing model portfolio adoption across the advisor ecosystem, and we are excited to offer access to this robust avenue to a portion of that market currently underserved by asset managers. Providing customized services to RIAs and IBDs is just the latest example of how WisdomTree puts the advisor first and showcases our unrelenting commitment to innovation."

Further information on WisdomTree's Portfolio and Growth Solutions services can be found on the blog here and email inquiries may be directed to wtpg@wisdomtree.com.

WisdomTree Model Portfolio information is designed to be used by financial advisors solely as an educational resource, along with other potential resources advisors may consider, in providing services to their end clients. WisdomTree Model Portfolios and any related content are intended for informational use only and are not intended to provide investment or financial planning advice by WisdomTree. WisdomTree Model Portfolio information should not be considered or relied upon as investment advice or as a recommendation from WisdomTree, including regarding the use or suitability of any WisdomTree Model Portfolio.

There are risks involved with investing, including possible loss of principal.

WisdomTree Funds are sold by prospectus only. You should carefully consider the investment objectives, risks, charges and expenses of the WisdomTree Funds before making an investment decision. The prospectus contains this and other important information. Please read it carefully before investing. To obtain a printed copy, please call 866.909.WISE (9473).

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

Investors should carefully consider the investment objectives, risks, charges and expenses of the Fund before investing. To obtain a prospectus containing this and other important information, call 866.909.9473 or visit wisdomtree.com. Read the prospectus carefully before you invest.

Thomas Skrobe and Jarrett Lilien are registered representatives of Foreside Fund Services, LLC. Foreside Fund Services is not affiliated with other entities mentioned.

WTPR-20220411-0167

About WisdomTree
WisdomTree Investments, Inc., through its subsidiaries in the U.S. and Europe (collectively, "WisdomTree"), is an ETF and ETP sponsor and asset manager headquartered in New York. WisdomTree offers products covering equity, commodity, fixed income, leveraged and inverse, currency, cryptocurrency and alternative strategies. WisdomTree currently has approximately $80 billion in assets under management globally.

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

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