

Introducing the Siegel-WisdomTree Model Portfolios

Modern Portfolios for Today's Investors



Dr. Jeremy Siegel

WisdomTree's Senior Economist, and Emeritus Professor of Finance at The Wharton School of the University of Pennsylvania, Dr. Jeremy Siegel, collaborated with WisdomTree to create three unique model portfolios, the Siegel-WisdomTree Global Equity Model, the Siegel-WisdomTree Moderate Model and the Siegel-WisdomTree Longevity Model.

Today's investors face a number of challenges. Market volatility, geopolitical turmoil, and Fed Policy uncertainty—these, combined with longer life spans, can make some investors worry their investment strategy won't be enough to carry them through retirement.

Individual investment strategies can often:

- Have costs that add up very quickly—eating away at returns
- Underperform over the long term
- Have significant overlap of underlying holdings—potentially leaving an investor overexposed to market risks

ETF Model Portfolios Can Help Solve These Investment Challenges

ETF Model Portfolios are investment strategies that leverage global asset allocation and research teams to construct portfolios designed to meet a broad range of investment objectives and risk tolerances. Models using ETFs can help solve the challenges of individual investment strategies as they provide the potential for:

- Enhanced returns
- Increased income
- Lower risks and downside protection

Investors and their advisors have increasingly turned to ETF models to help ensure that their investment strategies are better equipped to navigate any market environment.

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Solving the Challenges Investors Face

It's only natural that the longer investors live, the more assets they will need to support and maintain their lifestyle. Market conditions, combined with people living longer than ever, pose a serious question: Will the strategies that worked in the past continue to work in the future?

We have our doubts. The research behind *Stocks for The Long Run* has shown*:

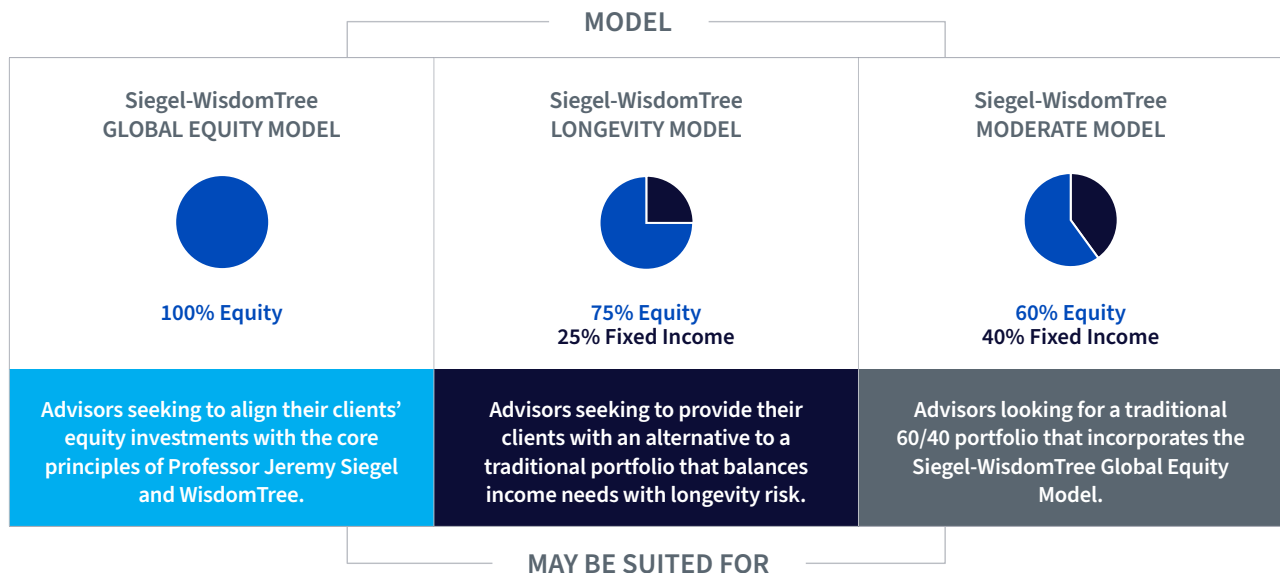
- Longer life expectancy requires individuals to rethink their retirement planning and asset allocation
- Historically, value and dividend-paying stocks have shown higher returns and lower risk than growth stocks
- A fully diversified, global equity portfolio offers potential for long-term return and risk diversification benefits

The Siegel-WisdomTree Model Portfolios Can Help

Designed by WisdomTree's Model Portfolio Investment Committee and Professor Siegel's research, we created three model portfolios that all share the following characteristics:

- Attractive risk-adjusted returns potential
- Higher current income/yield potential for maintaining current lifestyle in retirement
- Reduced opportunity for short-fall risk and/or being able to fund legacy objectives
- Increased tax-efficiency compared to mutual funds to help you keep more of what you make¹
- Diversification on a global scale

The Portfolios at a Glance



* Source: Siegel, Jeremy J. with Schwartz, Jeremy. *Stocks for the Long Run : The Definitive Guide to Financial Market Returns and Long-Term Investment Strategies* (6th ed.). New York: McGraw-Hill. Past performance is not indicative of future results. Dividends are not guaranteed and may fluctuate. Diversification does not ensure profits or prevent losses.

¹ ETFs are known to be more tax efficient than mutual funds due their secondary trading and in-kind create/redeem process.

So, Who Is Siegel and Why Does It Matter?

Professor Jeremy J. Siegel, WisdomTree's Senior Economist, is the Russell E. Palmer Emeritus Professor of Finance at The Wharton School of the University of Pennsylvania. Professor Siegel has written and lectured extensively about the economy and financial markets and is a regular contributor to the financial news media. Additionally, he has been recognized by Businessweek as one of the highest rated business school professors, and he is a bestselling author.

Professor 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. This book was named as one of the 10 best investment books of all time by *The Washington Post*.² Three key takeaways from Professor Siegel's research over his nearly 50-year career are:

- Stocks outperformed bonds significantly after accounting for inflation³
- Despite higher returns, stocks are less risky than bonds measured by annual standard deviation when given over 20- to 30-year time frames³
- The Noisy Market Hypothesis: Prices of securities are not always the best estimate of the true underlying value of the firm, as stock prices are constantly being impacted by buying and selling that are unrelated to the fundamental value of the firm

Put Professor Siegel to Work for You

WisdomTree and Professor Siegel have come together to create models that enable you to put his legendary investment wisdom into your portfolio.

For more information on Professor Siegel and the Siegel-WisdomTree Model Portfolios, consult with your investment advisor or visit [WisdomTree.com/investments](https://www.wisdomtree.com/investments).

² James K. Glassman, "Try These Books to be a Better Investor," *The Washington Post*, 11/9/97.

³ Source: Jeremy Siegel, *Stocks for the Long Run*, 2022.

GLOSSARY

Standard deviation: A measure of how widely an investment or investment strategy's returns move relative to its average returns for an observed period. A higher value implies more "risk," in that there is more of a chance the actual return observed is farther away from the average return.

Volatility: A measure of the dispersion of actual returns around a particular average level.

IMPORTANT INFORMATION

Investors should carefully consider the investment objectives, risks, charges and expenses of the Funds before investing. U.S. investors only: To obtain a prospectus, or summary prospectus, containing this and other important information, please call 866.909.WISE (9473), or go to [WisdomTree.com/investments](https://www.wisdomtree.com/investments). Read the prospectus carefully before you invest.

There are risks associated with investing, including 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. Due to the investment strategy of certain Funds, they may make higher capital gain distributions than other ETFs. Please see prospectus for discussion of risks.

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The Model Portfolios presented are available through separate third-party platforms, and the strategies cannot be purchased directly from WTAM. WTAM's parent company may have a financial interest in such a platform.

Jeremy Siegel serves as Senior Economist to WisdomTree, Inc., and its subsidiary, WisdomTree Asset Management ("WTAM" or "WisdomTree"), and 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. The Siegel-WisdomTree Longevity Model Portfolio seeks to address increasing longevity by shifting the focus to potential long-term growth through a higher stock allocation versus more traditional "60/40" portfolios.

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