Exploring Our CIO-Managed Model Portfolios

Published December 19, 2024

Andrew Okrongly, CFA
Director, Model Portfolios

Kara Dombroski
Head of Business Management and Strategy, Portfolio Solutions

Key Takeaways

- WisdomTree's new Portfolio Solutions web page allows advisors to easily search for Model Portfolios based on key criteria like investment objective, asset class, risk profile and region.
- This feature streamlines the process of identifying portfolios that align with client goals and preferences.

Listen to the blog post below:

At WisdomTree, we're committed to empowering advisors like you with resources that make it easier to service clients and grow your business. That's why we're excited to introduce a new feature on our Portfolio Solutions page, designed to help advisors seamlessly navigate our wide range of CIO-Managed Model Portfolios. This tool is built to save you time and help you efficiently match the right Model Portfolio to your clients' unique needs and preferences.

Simplifying Portfolio Selection with Key Filters

Advisors can now apply specific filters based on a variety of investment criteria, making it easier than ever to find the right portfolio for your clients. Whether your focus is on growth, income, capital preservation or strategies that include alternative investments, our new tool helps you to streamline your search using these key factors:

- **Investment Objective:** Easily find portfolios tailored for specific client goals, such as growth, income, capital preservation or alternatives.

- **Asset Class:** Filter for single-asset class models (e.g., equities or bonds) or opt for multi-asset class models that align with a client's specific allocation preferences.
- **Risk Profile:** Quickly narrow down portfolios based on risk tolerance, whether you're seeking conservative, moderate or aggressive strategies.
- **Region:** Search by geographic region, such as U.S.-only, global, international or emerging markets, to match your clients' regional investment preferences.

This new feature simplifies the process of matching portfolios to your clients' needs, making it easier to identify tailored investment solutions. Once you've selected the right portfolios for your clients, we'll help you effortlessly deliver timely and relevant portfolio information directly to them.

Save Time and Focus on What Matters Most

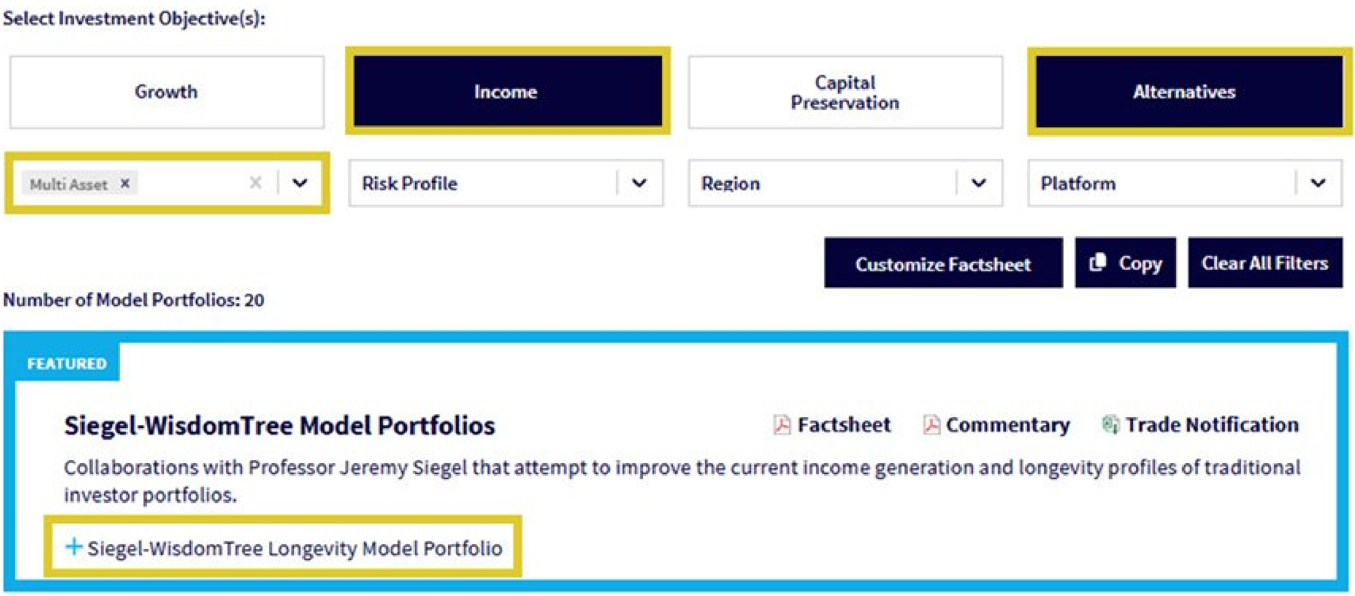
We know that creating client-ready materials can be time-consuming, often taking away from more valuable activities. That's why we've developed a suite of resources designed to simplify your workflow. With pre-built, client-approved collateral—including customized factsheets, performance updates and market commentary—you can keep your clients informed without spending hours on content creation. This frees up your time for high-impact tasks, like strengthening client relationships and driving strategic growth.

Crafted by Industry Experts

WisdomTree's CIO-Managed Model Portfolios are thoughtfully crafted by our Model Portfolio Investment Committee, which includes financial thought leaders like Professor Jeremy Siegel and Jeremy Schwartz, WisdomTree's Global Chief Investment Officer. Their strategic vision and expertise are embedded in every model, giving you confidence in the solutions you present to your clients.

How It Works: A Real-World Example

Let's take a typical scenario: You're looking for a multi-asset class Model Portfolio that aims to generate income while also incorporating alternative investments. With just a few clicks, our tool would help identify the Siegel-WisdomTree Longevity Model Portfolio as a potential solution. From there, you can explore detailed information on performance, holdings and underlying fund exposures—all in one place.



Once you've identified a suitable portfolio, you can easily access a comprehensive overview of each model, including performance metrics, asset allocation breakdowns and exposures to specific asset classes. Our downloadable resources, such as customized factsheets and trade notifications, are regularly updated to ensure you have the latest information at your fingertips. You can also subscribe to follow specific portfolios and receive automatic updates whenever changes are made, keeping you in the loop and enabling timely communication with your clients.

We invite you to explore our enhanced Portfolio Solutions Program and discover how our resources can help you streamline your workflow, save time and focus on growing your practice. Visit the Portfolio Solutions page today to start using the new filter tool and access our full suite of advisor resources.

Important Risks Related to this Article

The charts/visuals presented in this blog are hypothetical and for illustration purposes only.

For financial advisors: 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's Model Portfolios and related content are for information only and are not intended to provide, and should not be relied on for, tax, legal, accounting, investment or financial planning advice by WisdomTree, nor should any WisdomTree Model Portfolio information 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, any particular security or any particular strategy.

For retail investors: WisdomTree's Model Portfolios are not intended to constitute investment advice or investment recommendations from WisdomTree. Your investment advisor may or may not implement WisdomTree's Model Portfolios in your account. The performance of your account may differ from the performance shown for a variety of reasons, including but not limited to: your investment advisor, and not WisdomTree, is responsible for implementing trades in the accounts; differences in market conditions; client-imposed investment restrictions; the timing of client investments and withdrawals; fees payable; and/or other factors. WisdomTree is not responsible for determining the suitability or appropriateness of a strategy based on WisdomTree's Model Portfolios. WisdomTree does not have investment discretion and does not place trade orders for your account. This material has been created by WisdomTree, and the information included herein has not been verified by your investment advisor and may differ from information provided by your investment advisor. WisdomTree does not undertake to provide impartial investment advice or give advice in a fiduciary capacity. Further, WisdomTree receives revenue in the form of advisory fees for our exchange-traded Funds and management fees for our collective investment trusts.

References to CIO (Chief Investment Officer), "CIO-Managed" and "Shared CIO" are meant as a general reference to WisdomTree Model Portfolio subscriptions, consultation regarding WisdomTree Model Portfolios and WisdomTree Model Portfolios that may be customized to firm-specific objectives or unique firm-specific investment needs ("custom model portfolios"), and WisdomTree is not acting in an investment advisory, fiduciary or quasi-fiduciary capacity in connection therewith. Such material, and any assistance provided as described herein, including portfolio construction, WisdomTree Model Portfolios, custom model portfolios, asset allocation stress testing, assessments, discussions, output or other assistance (whether by WisdomTree personnel or digital tools) are (i) for information only and are not intended to provide, and should not be relied on for, tax, legal, accounting, investment or financial planning advice, (ii) not personalized investment advice or an investment recommendation from WisdomTree and (iii) intended for use only by a financial professional, 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 professionals are responsible for making their own independent judgment as to how to use such information.