Inside WisdomTree Portfolio Consultations

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Key Takeaways

- WisdomTree Portfolio Consultations provide personalized, actionable insights to help advisors enhance portfolio performance and meet specific investment goals.
- Advisors can benefit from a thorough portfolio analysis, custom suggestions and a collaborative review process tailored to their unique needs and challenges.
- Ongoing support and access to WisdomTree's educational resources ensure advisors can continuously refine their strategies and drive long-term success for their clients.

In today's complex financial environment, we believe that advisors need more than market expertise to help their clients succeed—they need tailored insights, reliable tools and practical solutions designed to save time, drive growth and strengthen their client relationships. WisdomTree Portfolio Consultations were built to meet these needs, offering advisors actionable, tailor-made ideas for their portfolios—all at no cost.

Portfolio consultations are a valuable resource for advisors regardless of their firm size, channel or stage in the business cycle. From mega RIA aggregators seeking scalability to new advisors pursuing business growth, we meet with advisors nationwide and provide solutions to address their varying needs. These consultations can be focused on solving specific portfolio challenges or can take a broader approach, covering strategic market views and top-down ideas for improvement.

Our process is deliberate and outcome focused. We work closely with advisors to understand their practice, challenges and clients' investment goals. Since no two advisor portfolios are alike, each consultation is fully customized with suggestions handpicked for the advisor's unique circumstance.

Step One: Understanding Investment Goals and Mandates

The consultation process at WisdomTree begins with an in-depth exploration of the advisor's goals and investment philosophy. Advisors are provided with a questionnaire that allows them to outline any specific targets or mandates they have for their portfolios. In this form, advisors can indicate their desired asset allocation mix, preferred list of fund issuers, yield targets, fee constraints, volatility thresholds and more. Our goal is to understand the advisor's objective, so our subsequent analyses and suggestions align with their vision.

Step Two: In-Depth Portfolio Analysis

Following the initial goal setting, our team conducts a thorough analysis of the existing portfolio. This step involves evaluating each sleeve of the asset allocation to identify key risks, redundancies or discrepancies with the investment strategy. Our analysis spans a range of services including risk deconstruction, holdings-based overlaps, factor analysis, stress-testing, sector and region exposure analysis, and more. The team also reviews the portfolio's security selection by closely examining fund methodologies and exposures.

Step Three: Personalized Suggestions

Once the existing portfolio review is complete, our team meets and creates custom, actionable ideas for the advisor's portfolio. Drawing on the insights of WisdomTree's global research team, our suggestions are open-architecture and accompanied by detailed commentary that explains the rationale behind each change. The team builds a custom report for the advisor, displaying how the adjustments would affect the portfolio's overall exposure, performance, volatility and risk. This comprehensive report helps the advisor understand the impact of each change and how it aligns with their stated goals.

Step Four: Collaborative Review

The last step in the consultation process is a direct meeting with WisdomTree's Portfolio Construction team. During this collaborative session, our team presents the portfolio analysis report, answers any questions, and engages in an open discussion with the advisor. When an advisor raises concerns or requests changes, our team carefully listens and makes any necessary adjustments. This interactive step fosters an open exchange of ideas, with the goal that the final portfolio meets the expectations of both the advisor and the end client.

Step Five: Ongoing Support and Educational Resources

The value of WisdomTree's consultation services extends far beyond a one-time portfolio review. Our team re-engages with advisors at their preferred cadence, offering continuous support and consultations as needed. Advisors also benefit from ongoing access to WisdomTree's online tools, educational resources and market insights. From in-depth fund and portfolio comparison tools to frequent blog posts from our thought leaders, WisdomTree's online resources provide a wealth of information, empowering advisors to better serve their clients.

Take the Next Step with WisdomTree's Portfolio Consultation Services

For advisors looking to elevate their investment strategies and provide enhanced value to clients, WisdomTree's Portfolio Consultation services offer a comprehensive and collaborative solution.

To learn more about WisdomTree's Portfolio Consultation services and how they can benefit your practice, visit our Portfolio Consultation page. Let WisdomTree be your partner in building stronger portfolios and achieving greater success.

Important Risks Related to this Article

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