Scaling Your Practice without Sacrificing Personalization: Introducing the Custom Model Portfolio Builder

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Key Takeaways

- As demand for personalized investment solutions rises, advisors need tools that allow them to efficiently scale their practice without sacrificing customization.
- Our Custom Model Portfolio Builder tool streamlines portfolio management by leveraging CIO-Managed Model Portfolios as a foundation while allowing advisors to tailor allocations to individual client needs.
- By automating rebalancing and providing real-time updates, this tool enables advisors to focus on client relationships and business growth rather than manual portfolio adjustments.

More and more advisors tell us the same thing: clients expect greater personalization in their portfolios. In fact, 60% of wealth managers expect their high-net-worth clients to require some degree of personalization either now or in the future.1 But delivering customized investment solutions across multiple clients is no easy task.

How do you scale your practice while ensuring each client gets a portfolio that aligns with their specific needs?

That's exactly why we created the **Custom Model Portfolio Builder**—a powerful digital tool designed to help you deliver personalized portfolios efficiently and at scale.

The Best of Both Worlds: Efficiency and Customization

You shouldn't have to choose between streamlining your practice and offering truly customized portfolios. The **Custom Model Portfolio Builder** helps you do both by combining the discipline of model-based investing with advisor-led customization.

Start with CIO-Managed Models as Your Foundation

There's no need to build portfolios from scratch. WisdomTree's CIO-Managed Model Portfolios are designed with strategic asset allocation, risk management and factor tilts—giving you a solid institutional-quality starting point. You can then adjust them as needed to fit your clients' investment goals.

Customize Your Model Portfolio Families

Clients have different objectives—and now, you can easily accommodate them. With this tool, you can:

- **Choose between an income-focused or growth-focused equity allocation**, ensuring alignment with each client's financial objectives.
- **Define how many risk tolerances** you want to include in a custom model portfolio family.
- **Customize equity and fixed income allocations** for each risk profile, balancing risk and return based on your clients' profiles.

Rebalancing Managed by WisdomTree's Model Investment Team

Keeping portfolios aligned with market conditions and client needs is critical—but it shouldn't take up all your time. Our Investment Team will rebalance and update these portfolios regularly. You will then receive real-time notifications, customizable fact sheets and commentary whenever changes are made, ensuring you're always informed and able to easily communicate with your clients.

Instead of spending hours monitoring portfolios, you can focus on what matters most: your clients and business growth.

How This Tool Helps You as an Advisor

The Custom Model Portfolio Builder was designed with one goal in mind: to help you efficiently scale your practice while delivering an elevated personalized client experience.

1. Save Time while Managing More Clients

By starting with our CIO-Managed Model Portfolios and customizing where needed, you can apply a consistent investment strategy across multiple clients—without manually adjusting every portfolio.

2. Deliver a More Personalized Client Experience

Clients want to feel like their portfolios reflect their unique investment preferences, risk tolerances and financial objectives. Our tool makes that possible.

3. Differentiate Your Practice and Strengthen Client Relationships

In an increasingly competitive landscape, your ability to offer personalized investment solutions at scale sets you apart. With this tool, you can deepen client relationships, increase retention and attract new business by delivering tailored portfolios with ease.

What This Looks Like in Practice

Imagine you're managing 100 client accounts, each with different investment objectives. Instead of manually adjusting portfolios one by one, you:

- **Start with a CIO-Managed Model Portfolio** as the foundation.
- **Choose an equity allocation focus**—offering clients either growth-oriented or income-focused models.
- **Modify holdings as needed**, swapping out ETFs based on client preferences.
- **Customize the model portfolio family**, defining up to five risk tolerances and adjusting the equity and fixed income allocations for each risk profile.
- **Automatically generate customized factsheets and reports**, making client conversations seamless.
- **Let WisdomTree's Investment Team handle ongoing rebalancing**, keeping portfolios aligned with market conditions.

Now, instead of spending hours managing individual accounts, you're able to deliver customized solutions efficiently, freeing up time to focus on client engagement and growing your business.

Bringing It All Together

The **Custom Model Portfolio Builder** was designed to help you grow your business, improve efficiency and deliver a better client experience. With this tool, you can scale your practice while maintaining personalization, leveraging CIO-Managed Model Portfolios, customizing allocations and streamlining rebalancing. Rather than spending valuable time manually managing portfolios, you can focus on deepening client relationships and expanding your business.

Are you ready to scale your practice without compromising personalization?

Explore the Custom Model Portfolio Builder today.

1 Christopher C. Williams, "Client Demand Growing for Personalized Portfolios, Survey Finds," *Financial Advisor Magazine*, 1/24/25, https://www.fa-mag.com/news/as-clients-demand-personalization-wealth-managers-lament-technology-shortfall--says-msci-81107.html.

Important Risks Related to this Article

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