# The Future Is Custom

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## Key Takeaways

- As markets grow more volatile and clients demand greater personalization, advisors are turning to customizable model portfolios like WisdomTree's Shared CIO service to scale efficiently without sacrificing control.
- The Shared CIO platform combines institutional investment rigor with flexible implementation, allowing advisors to tailor portfolios by strategy, manager, theme and trading frequency at no additional strategist cost.
- WisdomTree recently announced a strategic investment and commercial arrangement with Quorus, a technology-forward asset manager focused on tax-efficient implementation.

The investing world isn't getting any simpler. Market cycles are moving faster, geopolitical risk is more pronounced and product proliferation is reaching dizzying heights. In this dynamic environment, advisors are feeling the pressure to deliver sophisticated, personalized solutions—while keeping their practice efficient and scalable.

That's precisely why we built the WisdomTree's Shared CIO custom model portfolio service.

This isn't outsourcing for the sake of efficiency alone. It's a collaborative platform that helps advisors modernize their investment process without giving up control. With Shared CIO, advisors partner directly with members of our Model Portfolio Investment Committee to design tailored model portfolios that reflect their firm's values and their clients' goals.

Every portfolio is built on a foundation of institutional rigor—leveraging the investment expertise of our Global Research Team and Model Portfolio Investment Committee across global equity, fixed income, alternatives and currency markets. But the real power comes from the flexibility. Want to include specific managers? Adjust trading frequency? Tilt toward themes like income or alternatives? That's all on the table. This is customization without compromise.

Shared CIO was built to be accessible. There are no strategist fees, and we've intentionally kept our AUM requirements more flexible than the rigid thresholds often seen elsewhere. The open-architecture design gives advisors the flexibility to incorporate preferred managers and strategies, and implementation is seamless across major platforms. Just as important, we offer robust marketing support—white-labeled or co-branded—including factsheets, commentaries, brochures and other materials to help advisors effectively communicate strategy and performance to clients and prospects.

We've seen Shared CIO drive real transformation for advisory firms. Practices in growth mode can use it to streamline their investment process and scale with confidence. Aggregators can use it to create consistent, centralized portfolios that help ease transitions for newly acquired advisor teams. And for advisors looking to modernize their investment vehicle lineup, Shared CIO can help replicate legacy mutual fund exposures with ETF-based portfolios that enhance tax efficiency, reduce costs and preserve the intent of the original strategy.

And now, there's even more reason to take notice.

WisdomTree recently announced a strategic investment and commercial arrangement with Quorus, a technology-forward asset manager focused on tax-efficient implementation. As WisdomTree's Head of Portfolio Solutions recently outlined in this blog, this collaboration enhances the advisor experience even further, providing no-cost trading for advisors implementing WisdomTree custom models through the Quorus platform. It's another example of how we're removing friction from the portfolio construction process, making high-quality, personalized implementation more accessible than ever.

This is about more than models. It's about helping advisors modernize the way they build portfolios, keeping them in the driver's seat while unlocking the kind of scale and precision that today's clients demand. And the broader industry momentum supports it: according to Morningstar, assets in customizable model portfolios have grown nearly 50% year over year, reaching more than $125 billion.1 This shift reflects a growing recognition that personalization and efficiency no longer have to be at odds.

In a world of rising complexity, advisors don't need to go it alone. With Shared CIO, you're not just accessing investment expertise, you're building a better version of your practice. One that's ready for what's next.

Let's build it—together.

1 Source: Stephen Margaria, "How Model Portfolios Are Evolving," *Morningstar*, 2/4/25. https://www.morningstar.com/financial-advisors/how-model-portfolios-are-evolving.

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