Unlocking Investment Potential with WisdomTree CIO-Managed Model Portfolios

Published December 13, 2024

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Key Takeaways

- **Dynamic Approach:** Our CIO-Managed Model Portfolios combine the performance potential of active approaches with the discipline of passive methods.
- **Expert Guidance:** Led by industry leaders including Professor Jeremy Siegel, our dedicated Model Portfolio Investment Committee helps drive informed decision-making and prudent risk management.
- **Diverse Options:** With a variety of models tailored for growth, income and wealth preservation, we believe that WisdomTree offers a portfolio to fit every client's unique objective and risk profile.

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For advisors considering model portfolios for their practice, WisdomTree's CIO-Managed Model Portfolios stand out for their innovative approach, marrying the performance potential of active strategies with the discipline of passive investments.

This unique blend not only helps advisors pursue their clients' specific financial goals—whether focused on growth, income or wealth preservation—but also adapts to changing market conditions through both strategic and tactical adjustments.

WisdomTree Model Portfolio Investment Committee

At the heart of all our Model Portfolios is the WisdomTree Model Portfolio Investment Committee, comprising financial thought leaders including Professor Jeremy Siegel and Jeremy Schwartz, our Global Chief Investment Officer.

This committee convenes monthly and on an ad-hoc basis during times of market volatility, ensuring that our investment decisions are informed by both rigorous research and timely insights. Their expertise helps

guide our allocation decisions across equities, bonds and alternative investments, which is crucial for effective risk management.

WisdomTree's Model Portfolio Investment Committee



Professor Jeremy Siegel, PhD
Senior Economist to WisdomTree
Russell E. Palmer Emeritus Professor of Finance, The Wharton School



Jeremy Schwartz, CFA
Global Chief Investment Officer



Rick Harper
Chief Investment Officer of Fixed Income and Model Portfolios



Kevin Flanagan
Head of Fixed Income Strategy



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Our Investment Philosophy

Our portfolio management process focuses on three potential sources of enhanced risk-adjusted returns relative to traditional market-cap benchmarks: asset allocation, quantitative factor tilts and security selection.

We expect that our top-down asset class views and factor tilts within asset classes will drive most of our relative performance. These tilts can include long-term strategic factor exposure that is consistent with WisdomTree and Professor Siegel's research (value, dividends, quality) and more dynamic factors that may evolve over time (size, growth, momentum, low volatility).

As we rely predominantly on enhanced index strategies to construct portfolios, the index rules/methodology will drive security selection. Therefore, WisdomTree's background as an index developer and ETF manager is critical to ensuring the security selection process achieves our desired investment exposures.

We leverage an open architecture model that incorporates both WisdomTree and third-party ETFs, allowing advisors to access a wide range of top-tier investment products without incurring additional strategist fees. Additionally, our ETF-focused approach helps to improve transparency, cost-efficiency and tax advantages—key components that enhancing clients' investment experience.

A Range of Portfolios Designed by Our Investment Committee

Launched in 2013, our CIO-Managed Model Portfolios have a proven track record of success over the past decade. We offer a diverse selection of Model Portfolios designed to meet various investment objectives.

Whether clients are seeking capital appreciation, steady income or capital preservation, we have tailored solutions that address different risk profiles.

WisdomTree's CIO-Managed Model Portfolios



Source: WisdomTree

Additionally, our portfolios include options with allocations to alternative investment strategies, catering to investors looking for diversification beyond traditional asset classes.

Notably, in 2019, we collaborated with Professor Siegel to create the Siegel-WisdomTree Model Portfolio suite, which blends Siegel's groundbreaking academic research with our own innovative investment insights.

In summary, the WisdomTree CIO-Managed Model Portfolios represent a sophisticated and adaptable approach to investing, backed by expert guidance with a commitment to risk management. By offering a variety of models that align with client goals, we empower advisors to help their clients effectively navigate the complexities of today's investment landscape. For advisors seeking to optimize their portfolio selection process, our upcoming blog post in this series dives into the advanced filter tool available as part of the WisdomTree Portfolio Solutions program. This tool is designed to streamline portfolio identification, seeking to ensure that you can efficiently align client objectives with the most suitable models. Explore our Portfolio Solutions Program and stay ahead as we continue to provide resources that elevate your advisory practice.

Important Risks Related to this Article

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.

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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.