When Markets Shake, Advisors Steady the Ship

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Ryan Krystopowicz, CFA
Head of RIA Portfolio Solutions Distribution & Specialists

Key Takeaways

- Amid persistent market volatility, advisors are being called to lead with clarity and emotional intelligence, providing not just portfolio guidance but vital reassurance and perspective.
- Our research reveals that clients now expect real-time communication and deeper personal support, redefining how trust and value are measured in advisor relationships.
- By leveraging institutional-grade model portfolios and white-labeled resources, advisors can enhance client confidence and efficiency, turning market uncertainty into a relationship-strengthening opportunity.

Market headlines may change daily, but the role of a financial advisor remains remarkably consistent: to be the calm in the storm, the strategist with a plan and—most importantly—the voice of reason when clients need it most.

In moments of uncertainty, advisors are called to lead—not simply by adjusting allocations, but by anchoring their clients with clarity and confidence. These aren't just routine check-ins or market updates. These are defining moments. And in many ways, they're the moments that distinguish good advisors from great ones.

Volatility: More Than Market Noise—A Relationship Catalyst

At WisdomTree, we've long believed that volatility doesn't just test portfolios—it tests relationships. And few periods made that clearer than the COVID-induced sell-off of 2020.

The pandemic triggered an unprecedented stress test for both markets and advisory practices. To understand the lasting effects, we conducted proprietary research to examine how investor expectations shifted—and the results were revealing[1]:

- **Real-Time Responsiveness Became the Baseline:** Clients increasingly expect immediate access to insights and updates. In a world where information moves fast, advisors who communicate slowly fall behind.

- **Emotional and Life-Changing Needs Took Center Stage:** Investors began to value their advisors not just for financial expertise, but for guidance that addressed deeper, more personal needs—security, reassurance and peace of mind. More can be found on this topic in this blog post.
- **Confidence and Clarity Rose to the Top:** Clients wanted to feel confident that their goals remained attainable and to understand exactly how their advisor was positioning them to endure and recover.

These shifts reinforced a powerful truth: in the eyes of the client, the most valuable service an advisor provides isn't a portfolio—it's perspective.

Empowering Advisors to Communicate with Purpose

This is where third-party model managers like WisdomTree can play an essential role—not as a replacement for advisor insight, but as a force multiplier.

By partnering with institutional-caliber portfolio strategists, advisors gain more than just models—they gain a team of experts monitoring global markets, generating insights and creating resources designed to elevate communication.

- **Building Confidence:** Clients feel more secure when they know there's a team—CFA® charterholders, PhDs and market strategists—behind their advisor's recommendations. Through white-labeled updates and timely analysis, advisors can show that their clients are not only cared for, but actively watched over.
- **Providing Clarity:** Thoughtfully crafted content—from market commentary to trade rationales—helps advisors explain complex market dynamics in simple, compelling ways. This transparency fosters deeper trust.
- **Resources That Deliver:** Our research shows that 98% of advisors would use third-party communication materials, and 90% say these resources make their practice more efficient. Communication, when done right, is a strategic advantage—not a time drain.[2]

Staying Strategic in a Shifting Landscape

Of course, communication must be paired with action. That's why WisdomTree's Model Portfolio Investment Committee has continued to adapt portfolios in response to the evolving market environment. We encourage you to click here to explore our insights and see how our perspective could enhance your approach.

Market narratives will continue to evolve—no one knows what next quarter's headlines will bring. But what remains timeless is the advisor's ability to guide clients through change with conviction and composure.

Lead with Clarity and Confidence

It's with this in mind that we built WisdomTree's Portfolio Solutions program—a comprehensive platform designed to help advisors implement institutional-quality portfolios, streamline operations and enhance their communication strategy. Whether you're focused on scaling your practice or strengthening client relationships, this program was built to support your vision of success.

Let us help you bring clarity to complex markets—and confidence to client conversations.

Join a Portfolio Solutions Informational Session to learn how we're collaborating with advisors to build, manage and trade customized Model Portfolios—and empower them to grow their practice with greater efficiency and focus. Click here to register.

For additional insights, subscribe to the *Modern Advisor Playbook,* a new bi-weekly LinkedIn newsletter designed to equip financial professionals with timely insights, practical strategies and real-world case studies to enhance both portfolio management and practice efficiency. Each edition will spotlight tools, trends and tactics to help you navigate evolving market dynamics and deliver greater value to your clients. Click here to subscribe.

[1] WisdomTree proprietary research: wisdomtree.com/investments/mac/client-research.
[2] Ibid.

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