

Who's MAC?

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This article is relevant to financial professionals who are considering offering Model Portfolios to their clients. If you are an individual investor interested in WisdomTree ETF Model Portfolios, please inquire with your financial professional. Not all financial professionals have access to these Model Portfolios.

WisdomTree is excited to announce the introduction of the [Model Adoption Center](#)—affectionately called the MAC. The journey to the MAC was an interesting one and it began with an advisor who told us that “I know things have changed. I feel like there are challenges around every corner, and it's just hard to stay ahead of the game on models.”

This advisor voiced feelings that we had heard in many conversations and inspired our research into third-party models. The MAC is the result of research with more than 6,000 investors that we've interviewed over the years, with over 2,000 in-depth model conversations, and hundreds of advisors that proved to us that third-party models can actually help reinforce your value as an advisor.

1. True investor ideas and perceptions about models, based on research findings from the past two years.
 - a. For example, did you know that 63% of the investors we surveyed believe that applying a third-party model to their portfolio would positively impact them?
 - b. Or that 90% of these investors thought it acceptable for their advisor to use a “preset investment model portfolio.”
 - c. According to our investors, you can and likely should be using third-party models to leverage expertise and focus on the more important aspects of your client relationships.
2. Materials and tools that help you better understand and explain what third-party models can offer to investors.
 - a. Brochures, white papers, emails and other prospecting materials.
 - b. A behavioral finance-based tool that helps you assess your client's tolerance and view the models that may fit their needs.
 - c. Information about how WisdomTree builds models.
3. Unprecedented access to the WisdomTree Model team.
 - a. You can chat online with a team member.

b. You can email the Investment Committee with questions.

c. You can follow a step-by-step guide for how to use models no matter what platform you are on.

Remember that many clients today want much more from advisors. Third-party models can help you meet their needs, while reinforcing your value. Consider that:

- Only you know your clients well enough to determine which solutions can best meet their goals and then customize them to meet their needs and values.
- Third-party models may enable you to better meet your clients' basic needs.
- Using third-party models can give you the time to focus on meeting clients' higher-level emotional and life-changing needs (see the research in the MAC for more on the Advisor Value Pyramid).

WisdomTree is committed to helping advisors to not only create better investment experiences for their clients, but also to build and grow their businesses. The MAC was designed to help you do both.

[Check it out.](#)

Important Risks Related to this Article

For retail investors: WisdomTree's Model Portfolios are not intended to constitute investment advice or investment recommendations from WisdomTree. Your investment adviser may or may not implement WisdomTree's Model Portfolios in your account. The performance of your account may differ from the performance shown for a variety of reasons, including but not limited to: your investment adviser, and not WisdomTree, is responsible for implementing trades in the accounts; differences in market conditions; client-imposed investment restrictions; the timing of client investments and withdrawals; fees payable and/or other factors. WisdomTree is not responsible for determining the suitability or appropriateness of a strategy based on WisdomTree's Model Portfolios. WisdomTree does not have investment discretion and does not place trade orders for your account. This material has been created by WisdomTree and the information included herein has not been verified by your investment adviser and may differ from information provided by your investment adviser. WisdomTree does not undertake to provide impartial investment advice or give advice in a fiduciary capacity. Further, WisdomTree receives revenue in the form of advisory fees for our exchange-traded funds and management fees for our collective investment trusts.

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. In providing WisdomTree Model Portfolio information, WisdomTree is not acting and has not agreed to act in an investment advisory, fiduciary or quasi-fiduciary capacity to any advisor or end client, and has no responsibility in connection therewith, and is not providing individualized investment advice to any advisor or end client, including based on or tailored to the circumstance of any advisor or end client. The Model Portfolio information is provided "as is," without warranty of any kind, express or implied. WisdomTree is not responsible for determining the securities to be purchased, held and/or sold for any advisor or end client accounts, nor is WisdomTree responsible for determining the suitability or appropriateness of a Model Portfolio or any securities included therein for any third party, including end clients. Advisors are solely responsible for making investment recommendations and/or decisions with respect to an end client and should consider the end client's individual financial circumstances, investment time frame, risk tolerance level and investment goals in determining the appropriateness of a particular investment or strategy, without input from WisdomTree. WisdomTree does not have investment discretion and does not place trade orders for any end client accounts. Information and other marketing materials provided to you by WisdomTree concerning a Model Portfolio—including allocations, performance and other characteristics—may not be indicative of an end client's actual experience from investing in one or more of the funds included in a Model Portfolio. Using an asset allocation strategy does not ensure a profit or protect against loss, and diversification does not eliminate the risk of experiencing investment losses. There is no assurance that investing in accordance with a Model Portfolio's allocations will provide positive

performance over any period. Any content or information included in or related to a WisdomTree Model Portfolio, including descriptions, allocations, data, fund details and disclosures, are subject to change and may not be altered by an advisor or other third party in any way.

WisdomTree primarily uses WisdomTree Funds in the Model Portfolios unless there is no WisdomTree Fund that is consistent with the desired asset allocation or Model Portfolio strategy. As a result, WisdomTree Model Portfolios are expected to include a substantial portion of WisdomTree Funds notwithstanding that there may be a similar fund with a higher rating, lower fees and expenses or substantially better performance.

Additionally, WisdomTree and its affiliates will indirectly benefit from investments made based on the Model Portfolios through fees paid by the WisdomTree Funds to WisdomTree and its affiliates for advisory, administrative and other services.

The WisdomTree Model Portfolio Investment Committee is also sometimes referred to as the Asset Allocation Committee.