Why WisdomTree's Portfolio Consultations Are a Game-Changer for Advisors

Published December 16, 2024

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

Key Takeaways

- WisdomTree's Portfolio Consultations empower advisors to remain actively involved in portfolio management while benefiting from customized, expert-driven insights at no additional cost.
- Advisors receive in-depth portfolio reviews, risk assessments and stress tests conducted by WisdomTree's Global Research Team, offering actionable strategies that seek to align portfolios with clients' goals.
- Beyond consultations, WisdomTree provides ongoing access to educational tools, investment insights and market analysis, supporting long-term advisor success.

Listen to the blog post below:

In today's financial world, we believe that advisors need more than market knowledge to help clients thrive—they need insights tailored to their clients, reliable tools and solutions that save time, support growth and strengthen relationships.

For years, WisdomTree has provided advisors with institutional-quality investment solutions through our CIO-Managed Model Portfolios, available directly or on third-party platforms. These are designed for advisors who want the convenience of outsourcing portfolio construction.

But after working with advisors across the country and drawing from my RIA experience, I've seen that not everyone wants to "hand over the keys." Many advisors still value being hands-on with portfolio management—that's why they got into the industry in the first place. And that's where WisdomTree Portfolio Consultations come in.

These consultations provide actionable, tailored insights for advisors who prefer to stay involved in portfolio construction, offering a flexible, efficient and scalable solution at no cost. WisdomTree's Portfolio Consultations bring a fresh perspective, leveraging the expertise of our Global Research Team to help you meet your clients' goals. The personalized report you receive includes a detailed portfolio review, risk assessments and actionable insights that are fully customized to align with your long-term success.

Why Advisors Choose WisdomTree's Portfolio Consultations

1. Personalized Approach

We customize each consultation to match your strategies, risks and allocation preferences—providing guidance that's unique to your portfolio.

2. Global Expertise

Our Global Research Team and Model Portfolio Investment Committee bring expertise across equity, fixed income, alternatives and currency markets. Why rely only on internal resources when you can leverage the insights of over 30 investment professionals at WisdomTree, many of whom hold PhDs and are CFA charterholders?

3. Ongoing Support and Resources

We don't stop at the consultation. Our team provides ongoing support and continuous access to our online tools, educational resources and market insights. From comparison tools to blog posts from our thought leaders, WisdomTree's resources give you a wealth of information to support your clients effectively.

What You'll Find in Your Customized Report

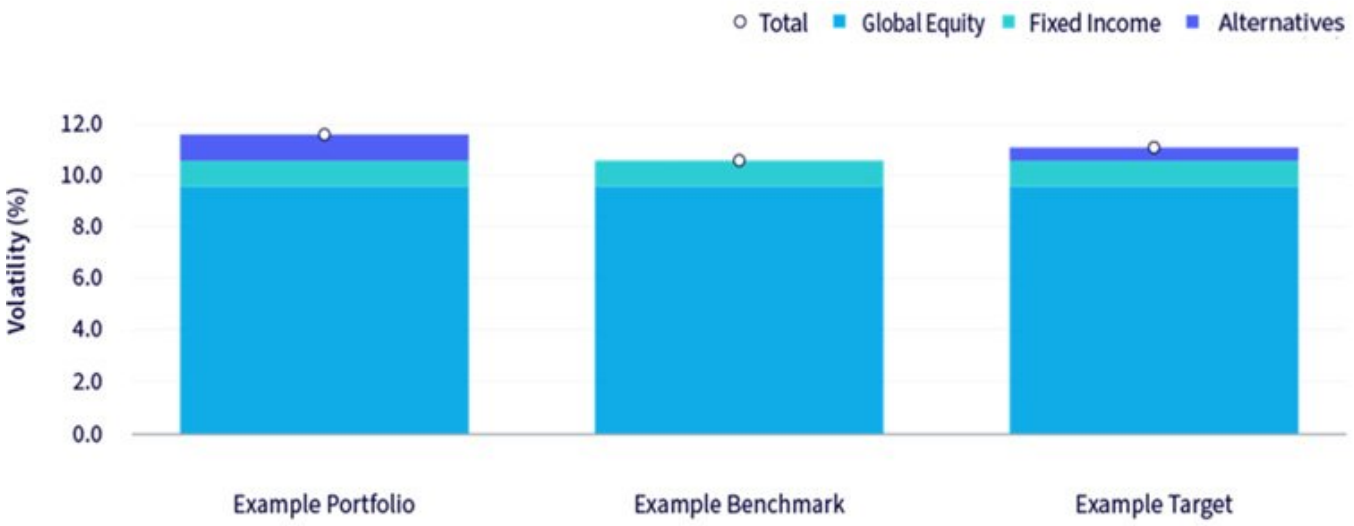
Asset Allocation Guidance

Our Model Portfolio Investment Committee offers insights across equity, fixed income and alternative markets. We'll compare your portfolio to these views and provide suggestions to align it with your goals.



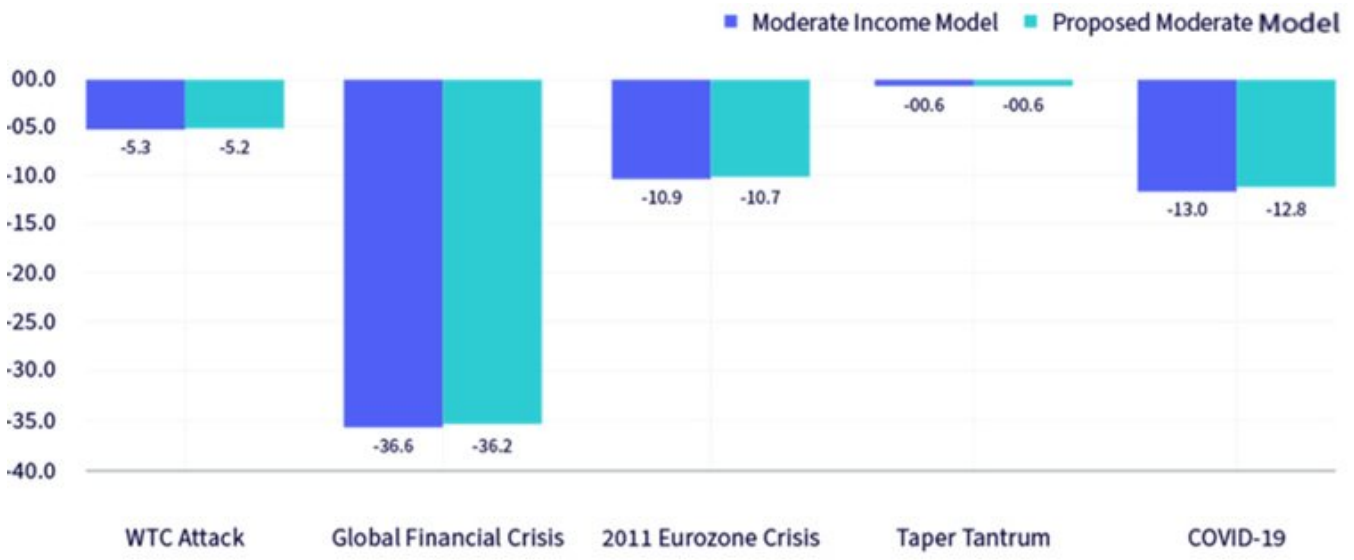
Risk Deconstruction

Understanding portfolio risks is crucial for long-term success. We assess your portfolio's key risks, evaluate their potential impact and offer strategies to mitigate them.



Portfolio Stress Testing

Our team runs stress tests to simulate various market conditions, helping you understand how your portfolio might perform in different scenarios. This identifies vulnerabilities and helps to prepare your portfolio to adapt to shifts in market outlook.



Individual Fund Analysis

With almost 4,000 ETFs in the U.S., it can be challenging to select the right ones for your goals. We evaluate every fund in your portfolio, looking at performance, methodology and risk profile to try and help ensure each one aligns with your objectives. This process can uncover new investment ideas and highlight any funds that might need adjustment.



Ready to Elevate Your Investment Strategy?

WisdomTree's Portfolio Consultation services offer a collaborative, all-in-one solution for advisors who want to enhance their investment strategies and add more value for clients. To learn more about our Portfolio Consultations and how they can benefit your practice, visit our Portfolio Consultation page. We look forward to partnering with you to build stronger portfolios and achieve lasting success.

Join a Portfolio Solutions Informational Session to learn more about WisdomTree's Portfolio Solutions program, and how we're collaborating with advisors like you to build, manage and trade customized Model Portfolios, and grow your practice. Click here to register.

Important Risks Related to this Article

The charts/visuals presented in this blog are hypothetical and for illustration purposes only.

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.

For retail investors: WisdomTree's Model Portfolios are not intended to constitute investment advice or investment recommendations from WisdomTree. Your investment advisor 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 advisor, 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 advisor and may differ from information provided by your investment advisor. 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.

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.