

June 29, 2023



Siegel-WisdomTree Longevity and Siegel-WisdomTree Global Equity Models Now Available on LPL's Model Wealth Portfolios Platform

NEW YORK--(BUSINESS WIRE)-- WisdomTree, Inc. (NYSE: WT), a global financial innovator, announced that its Siegel-WisdomTree Longevity and Siegel-WisdomTree Global Equity Models are now available on LPL Financial's unified managed account platform Model Wealth Portfolios (MWP).

Professor Jeremy Siegel, Senior Economist to WisdomTree and Emeritus Professor of Finance at The Wharton School of the University of Pennsylvania, and WisdomTree collaborated to bring LPL's more than 21,000 advisors two open architecture portfolios, offering no strategist fee and a \$10,000 minimum, designed to help clients address longevity risks while pursuing capital appreciation and income generation.

"Joining the Model Wealth Portfolios Platform marks an exciting new chapter in WisdomTree and LPL's relationship. The addition of these models offers LPL's advisors the flexibility to design a customized portfolio targeted to meet their clients' individual goals, with the goal of capitalizing on efficiency and maximizing growth," said Joe Grogan, WisdomTree Head of Distribution, Americas. "With growing momentum around model portfolios, we're proud to continue expanding our models' offerings for advisors and to continue doing so on premier platforms like LPL's."

MWP offers advisors flexibility, with hundreds of options to choose from to build their clients' portfolios. Through MWP, advisors can use, build or combine manager models with their own. With the ability to combine up to 20 models in one account, advisors have the flexibility to construct a unique portfolio designed just for their clients' individual goals, while potentially saving hours of time with outsourced investment selection, trading and rebalancing.

Siegel-WisdomTree Longevity Model Portfolio:

- Brings a unique strategy to investors with mid- to long-range time horizons trying to balance current income needs with longevity risk.
- Is designed with the goal to outperform a traditional 60% equity/40% fixed income portfolio in a risk-conscious manner by structurally allocating more toward equities over fixed income.
- Tilts toward factors such as dividend yield and low valuation ratios to seek higher income generation and outperformance potential.

Siegel-WisdomTree Global Equity Model Portfolio:

- Seeks to provide a diversified exposure to U.S. and International stocks and tilts toward the same factors as the Longevity Model.

“Through collaborations and strong partners, such as LPL, WisdomTree’s Model Portfolios are now available to over 65,000 financial advisors across the country. Adoption of managed models is one of the biggest macro trends in wealth management. We are still in the early innings, and we look forward to introducing many more advisors to our innovative investment strategies,” said Jarrett Lilien, WisdomTree President and Chief Operating Officer.

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 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.

There are risks involved with investing, including possible loss of principal.

Investors and their advisors should consider the investment objectives, risks, charges and expenses of the funds included in any Model Portfolio carefully before investing. This and other information can be obtained in the Fund’s prospectus by visiting wisdomtree.com/investments for WisdomTree Funds. Visit the applicable third-party fund family website for third-party funds. Please read the prospectus carefully before you invest. WisdomTree Asset Management, Inc. does not endorse and is not responsible or liable for any content or other materials made available by other ETF sponsors.

Jeremy Siegel serves as Senior Economist to WisdomTree, Inc., and its subsidiary, WisdomTree Asset Management, Inc. (“WTAM” or “WisdomTree”). He serves on the Model

Portfolio Investment Committee for the Siegel-WisdomTree Model Portfolios of WisdomTree, which develops and rebalances WisdomTree's Model Portfolios. In serving as an advisor to WisdomTree in such roles, Mr. Siegel is not attempting to meet the objectives of any person, does not express opinions as to the investment merits of any particular securities and is not undertaking to provide and does not provide any individualized or personalized advice attuned or tailored to the concerns of any person.

WisdomTree Funds are distributed in the U.S. by Foreside Fund Services, LLC.

Joe Grogan is a registered representative of Foreside Fund Services, LLC. Foreside Fund Services is not affiliated with other entities mentioned.

About WisdomTree

WisdomTree is a global financial innovator, offering a well-diversified suite of exchange-traded products (ETPs), models and solutions. We empower investors to shape their future and support financial professionals to better serve their clients and grow their businesses. WisdomTree is leveraging the latest financial infrastructure to create products that provide access, transparency and an enhanced user experience. Building on our heritage of innovation, we are also developing next-generation digital products and structures, including digital funds and tokenized assets, as well as our blockchain-native digital wallet, WisdomTree Prime™.

WisdomTree currently has approximately \$92 billion¹ in assets under management globally.

For more information about WisdomTree and WisdomTree Prime™, visit:
<https://www.wisdomtree.com>.

Please visit us on Twitter at @WisdomTreeNews.

WisdomTree® is the marketing name for WisdomTree, Inc. and its subsidiaries worldwide.

Category: Business Update

¹ AUM as of 6/28/2023

View source version on businesswire.com:
<https://www.businesswire.com/news/home/20230629676737/en/>

Media Relations

WisdomTree, Inc.

Jessica Zaloom

+1.917.267.3735

jzaloom@wisdomtree.com / wisdomtree@fullyvested.com

Investor Relations

WisdomTree, Inc.

Jeremy Campbell

+1.646.522.2602

Jeremy.Campbell@wisdomtree.com

Source: WisdomTree, Inc.