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WisdomTree and AdvisorEngine Strengthen Advisor Growth Program Through Key Technology Acquisition

Companies Integrate Kredible, a Technology-Enabled, Research-Driven Practice Management Firm Designed to Help Advisors Acquire New Clients

NEW YORK, April 27, 2017 (GLOBE NEWSWIRE) -- WisdomTree Investments, Inc. (NASDAQ:WETF), an exchange-traded fund ("ETF") and exchange-traded product ("ETP") sponsor and asset manager driven by research and technology, and AdvisorEngine Inc., a digital wealth management platform, jointly announce their commitment to providing advisor growth solutions through AdvisorEngine's acquisition of Kredible Technologies, Inc. ("Kredible"), a technology-enabled, research-driven practice management firm designed to help advisors acquire new clients.

WisdomTree and AdvisorEngine: Collectively Helping Advisors Grow Their Businesses

In November 2016, WisdomTree, an independent-thinking asset manager with a focus on research and a history of innovation, and AdvisorEngine, a B2B full enterprise wealth management technology platform, established a strategic relationship with a common goal: to help financial advisors grow their businesses and better connect with their clients in a rapidly evolving industry and regulatory environment.

"AdvisorEngine has been continuously focused on helping financial advisors scale and grow. Our investment in Kredible's powerful, research-based marketing tools further demonstrates our commitment to the financial services space," said AdvisorEngine CEO, Rich Cancro. "So many advisors struggle with building out a solid online presence; Kredible's platform streamlines the process with the goal of acquiring new clients."

Thomas Skrobe, WisdomTree Head of Client Solutions, said, "WisdomTree and

AdvisorEngine are committed to building a global advisor solutions program to help meet evolving client needs. With the wealth management industry changing quickly and significantly, financial advisors need to evolve the way they do business. Kredible's solutions are a natural addition to our offerings, enabling advisors to differentiate themselves and grow their businesses through digital enhancements and modern techniques."

Beyond WisdomTree's ETF, ETP and CIT offerings, the Company provides access to an advisor solutions program, which includes portfolio consulting services, model portfolios and practice management, incorporating leadership, organizational development and marketing services.

The Incredible Opportunity for Kredible

Kredible is a technology-enabled practice management firm targeting financial advisors with the goal of helping advisors modernize and enhance their online presence. Kredible research, including eye tracking studies of high net worth clients, shows that approximately 72% of the clients surveyed said online information is "extremely" or "very" influential to who they hire.

Direct benefits to the advisor include:

- Ability to attract more prospects and win more business by optimizing their digital presence, such as their social profiles and organic search rankings
- Access to relevant content and analytics
- A behavioral, research-based online property for each advisor that helps fill a void in most financial advisors' online presence

Brad Shepard, Kredible Founder and CEO, said, "Based on our research, more than 50% of new prospects indicate that they have eliminated a financial advisor from consideration based on what they did or didn't find about them online. The modern advisor must evolve to meet ever-changing expectations including the way their prospects and clients find them to determine if they are credible to manage their financial life and communicate with them on an ongoing basis."

"We're thrilled to join WisdomTree and AdvisorEngine in this effort," Shepard adds.

Enhancing Connectivity Between Client and Advisor

In February, AdvisorEngine announced the acquisition of a financial planning technology that both streamlines the onboarding process and includes an easy-to-use digital prospecting tool that helps financial firms create and deliver advice, execute on that advice and monitor client progress. Going forward, AdvisorEngine will continue to be an open architecture platform with key integrations to other financial planning tools and CRMs, as such tools are often very personal to the advisor.

AdvisorEngine's Cancro adds, "The financial investment and strategic relationship with WisdomTree has allowed us to expand the AdvisorEngine platform to deliver an innovative and sophisticated set of tools that advisors can use to differentiate themselves from the competition. Add Kredible to the platform, and you have a deeper, broader layer of advisor growth solutions to complement our existing solutions."

In November 2016, WisdomTree made a $20 million minority equity investment in

AdvisorEngine and announced a strategic agreement whereby WisdomTree's asset allocation models would be made available through AdvisorEngine's open architecture platform and WisdomTree would actively introduce the AdvisorEngine platform to its deep distribution network. WisdomTree is also announcing an additional $5 million investment in AdvisorEngine to continue to fuel its growth, leadership and innovation in the advisor solutions space.

About WisdomTree
WisdomTree Investments, Inc., through its subsidiaries in the U.S., Europe, Japan and Canada (collectively, "WisdomTree"), is an exchange-traded fund ("ETF") and exchange-traded product ("ETP") sponsor and asset manager headquartered in New York. WisdomTree offers products covering equities, fixed income, currencies, commodities and alternative strategies. WisdomTree currently has approximately $43.8 billion in assets under management globally. For more information, visit our Investor Relations website.

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

About AdvisorEngine Inc.
AdvisorEngine, a pioneer in digital wealth management technology, was the first company to integrate private-label robo-advice technology within a full enterprise B2B digital wealth management platform. AdvisorEngine integrates online and traditional wealth management processes and workflows to help advisors build deeper relationships with their clients. Its open architecture platform provides fully customizable robo-advisor tools, dashboards to analyze and track business development online account opening and funding, billing, data aggregation and performance reporting. AdvisorEngine helps investment firms scale their existing business profitably and connect with the next generation of clients and advisors. More information about the firm, which is headquartered in New York, is available at www.AdvisorEngine.com.

About SenaHill Partners
SenaHill Partners is a merchant bank offering a full suite of investment, operating and advisory services to the financial technology sector. From inception and capital raising through scaling and growth to strategic exit, SenaHill bridges the gap between FinTech innovators and global financial institutions to bring a new level of efficiency, collaboration and success to the industry. For more information please visit www.SenaHill.com.

SenaHill Securities, LLC acted as exclusive strategic and financial advisor to AdvisorEngine.

Inertia Advisors, a division of KEMA Partners LLC, acted as exclusive financial advisor to Kredible in connection with the transaction.

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