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# **WisdomTree Adds Scott Welch as Chief Investment Officer – Model Portfolios**

## **Welch to lead Company's Asset Allocation Team and Investment Committee and further strengthen model portfolio initiative**

NEW YORK, Sept. 16, 2019 (GLOBE NEWSWIRE) -- WisdomTree Investments, Inc. (NASDAQ: WETF), an exchange-traded fund ("ETF") and exchange-traded product ("ETP") sponsor and asset manager, today announced that Scott Welch has joined the firm as Chief Investment Officer – Model Portfolios. In this newly created role, Scott will oversee and lead WisdomTree's asset allocation team and investment committee, including other voting members Jeremy Schwartz, EVP and Global Head of Research and Rick Harper, Head of Fixed Income and Currency. He will be responsible for the performance and process of WisdomTree's ETF model portfolios, developing thoughtful investment research and content, managing model portfolio asset allocation and portfolio construction decisions and process and optimizing the Company's investment solutions for current and future advisors.

Jeremy Schwartz said, "Recent trends show that advisors are increasingly outsourcing investment management processes, such as portfolio construction, to third party providers like asset management companies. Scott's role as CIO – Model Portfolios can take advantage of this trend, playing a key decision-making role in developing and managing WisdomTree's world class investment solutions. Scott's deep knowledge and expertise of portfolio construction, model portfolio development and management and understanding advisors' focus areas will be incredibly valuable to leading a successful asset allocation team and investment committee at WisdomTree."

Scott comes to WisdomTree from Dynasty Financial Partners, a \$40 billion outsourcing provider of integrated research, technology and practice management solutions to RIAs and brokerage teams making the move to independence. Scott was the Chief Investment Officer at Dynasty for more than four years, where his responsibilities included chairing the Investment Committee and overseeing the firm's "Outsourced Chief Investment Officer" solution to Dynasty Network firms. This involved developing original investment research and thought-leadership content, overseeing model portfolio asset allocation and portfolio construction decisions, identifying and selecting research partners, and selecting and monitoring differentiated portfolio managers. In addition, he worked closely with firms in the Dynasty Network to optimize their investment solutions and customize investment solutions for large client opportunities.

Scott said, "I am thrilled to join such an innovative company and talented group of individuals in the ETF space. From my days working at a registered investment advisor to becoming the CIO at a wealth platform servicing multiple RIAs, I have a deep understanding of what advisors need and how to best serve them from an investment solutions perspective."

WisdomTree's ETF platform is exciting, and I look forward to helping grow the model portfolio and solutions business overall."

Prior to Dynasty, Scott worked from 1998-2008 in a variety of senior investment-related positions at a multi-billion-dollar RIA, and then co-founded Fortigent LLC, a high-end provider of outsourced research, technology and practice management solutions to RIAs and banks. Here he served as an Executive Vice President and was the Chief Investment Officer from 2008-2014, where he oversaw the firm's investment and research capabilities and managed a team of research professionals. Prior to 1998, Scott spent over twelve years on Wall Street, first at Swiss Bank Corporation and then at The Globecon Group, where he focused on capital markets, derivatives, risk management and relationship management.

Scott is a member of the Board of Directors of the Investments & Wealth Institute ("IWI", formerly known as IMCA), the Advisory Planning Board of the American Bankers Association Annual Wealth Management & Trust Conference, and the Editorial Advisory Boards of the IWI Investments & Wealth Monitor and The Journal of Wealth Management. Additionally, Scott frequently speaks on wealth management topics, and regularly authors industry-related articles that appear in numerous trade journals.

He holds the Certified Investment Management Analyst (CIMA®) designation, Investment Strategist and Alternative Investments Certificates from IWI, and a FINRA Series 7 license. Scott earned a M.B.A. in Finance from the University of Massachusetts at Amherst and a B.S. in Mathematics from the University of California at Irvine.

Scott will report to Jeremy Schwartz, WisdomTree EVP and Global Head of Research.

### **About WisdomTree**

WisdomTree Investments, Inc., through its subsidiaries in the U.S., Europe 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 \$60.9 billion in assets under management globally.

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

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