

June 26, 2025



## **WisdomTree Expands Offering in Fast-Growing Tax Efficient SMA/Direct Indexing Market; Makes Strategic Investment in Quorus**

*Investment enables advisors to access key WisdomTree products in SMA format; offers rebalancing and trading for WisdomTree Model Portfolios at no additional cost to advisors*

NEW YORK--(BUSINESS WIRE)-- WisdomTree, Inc. (NYSE: WT), a global financial innovator, announced today that it has made a strategic minority investment in, and entered into a multi-year collaboration with, Quorus Inc., a technology-driven asset manager with platform capabilities for delivering customizable, tax efficient investment solutions for asset managers and financial advisors. Investment strategies provided by WisdomTree Asset Management, Inc. ("WTAM") can now be implemented in a tax-efficient separately managed account ("SMA") format via the Quorus platform. In addition, advisors seeking to implement WisdomTree model portfolios will be able to do so with integrated trading and rebalancing at no additional platform, trading or rebalancing cost. RIAs initially will be able to access these strategies via the Schwab Managed Account Marketplace® later this summer, enabling seamless integration into their existing workflows with streamlined account setup and automated execution. WisdomTree's minority equity investment, completed in June 2025, illustrates the firm's commitment to the rapidly-growing custom SMA and Direct Indexing market and strengthens its position in this space.

"Tax Efficient SMAs are among the fastest-growing investment vehicles, and this investment positions WisdomTree to tap into this high-demand market segment," said Thomas Skrobe, Head of Portfolio Solutions of WisdomTree. "Through Quorus' innovative platform, we are expanding our reach to advisors who use SMAs. Most importantly, we're expanding our Portfolio Solutions platform to offer advisors multiple ways to evolve and manage their portfolios to best meet their clients' investing needs."

Quorus enables asset managers and advisors to seamlessly create and manage customized, tax-efficient portfolios that align with their clients' goals. Quorus specializes in implementing non-market cap weighted and traditional active investment strategies and provides a scalable solution for asset managers looking to enter the SMA space.

"We're grateful to partner with WisdomTree, a firm that shares our commitment to delivering impactful, innovative solutions for advisors," said John Hill, CEO and Co-Founder of Quorus. "By leveraging WisdomTree's expertise and resources, we're positioned to accelerate the adoption of tax-efficient, custom portfolio solutions, providing advisors with the tools they need to better serve their clients in an ever-evolving market."

Skrobe added, “We’re particularly excited about Quorus’ management team, whose expertise includes deep experience in investment product and direct indexing.” Hill previously served as head of Direct Indexing at Vanguard and led the design and launch of Vanguard’s direct indexing offer with Just Invest.

Quorus is a trusted technology partner in the rapidly evolving custom SMA and model portfolio market, known for enabling the delivery of personalized, tax-efficient portfolios at scale. By combining modern technology with quantitative portfolio management, Quorus automates the construction and rebalancing of custom strategies. The Quorus platform empowers asset managers to deliver differentiated, tax-managed solutions efficiently, enhancing both advisor workflows and their end-client outcomes.

WisdomTree’s strategic investment is part of a broader plan to diversify its portfolio offerings and extend its reach within the growing SMA market. The collaboration with Quorus is expected to drive significant growth for the firm as the SMA/Direct Indexing market matures, positioning both companies to capitalize on the increasing demand for custom, tax-managed portfolios.

Learn more about implementing WisdomTree’s strategies via an SMA [here](#).  
Learn more about WisdomTree’s Portfolio Solutions [here](#).

WisdomTree Funds are distributed by Foreside Fund Services, LLC.  
Thomas Skrobe is a registered representative of Foreside Fund Services, LLC.

For Financial Advisors: WisdomTree Model Portfolio and Investment Strategy 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 Investment Strategies for separately managed accounts (“SMAs”) information 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 or Investment Strategy 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, Investment Strategies for SMAs, any particular security or any particular strategy. While WisdomTree does not collect fees for the Model Portfolios, to the extent that WisdomTree exchange traded funds are included in a Model Portfolio, WisdomTree receives revenue in the form of advisory fees.

For Retail Investors: WisdomTree’s Model Portfolios and Investment Strategies for SMAs are not intended to constitute investment advice or investment recommendations from WisdomTree. Your investment advisor may or may not implement WisdomTree’s Model Portfolios or Investment Strategies for SMAs 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.

There are risks associated 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 or summary prospectus by visiting [wisdomtree.com/investments](https://wisdomtree.com/investments). Please read the prospectus carefully before you invest.***

### **About WisdomTree**

WisdomTree is a global financial innovator, offering a diverse suite of exchange-traded products (ETPs), models and solutions, as well as digital asset-related products. Our offerings empower investors to shape their financial future and equip financial professionals to grow their businesses. Leveraging the latest financial infrastructure, we create products that emphasize access, transparency and provide an enhanced user experience. Building on our heritage of innovation, we offer next-generation digital products and services related to tokenized real world assets and stablecoins, as well as our blockchain-native digital wallet, WisdomTree Prime<sup>®</sup> and institutional platform, WisdomTree Connect<sup>™</sup>.\*

\* The WisdomTree Prime digital wallet and digital asset services and WisdomTree Connect institutional platform are made available through WisdomTree Digital Movement, Inc., a federally registered money services business, state-licensed money transmitter and financial technology company (NMLS ID: 2372500) or WisdomTree Digital Trust Company, LLC, in select U.S. jurisdictions and may be limited where prohibited by law. WisdomTree Digital Trust Company, LLC is chartered as a limited purpose trust company by the New York State Department of Financial Services to engage in virtual currency business. Visit <https://www.wisdomtreeprime.com>, the WisdomTree Prime mobile app or <https://wisdomtreeconnect.com> for more information.

WisdomTree currently has approximately \$124.8 billion in assets under management globally.

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

Please visit us on X at @WisdomTreeNews.

WisdomTree<sup>®</sup> is the marketing name for WisdomTree, Inc. and its subsidiaries worldwide.

PRODUCTS AND SERVICES AVAILABLE VIA WISDOMTREE PRIME:

NOT FDIC INSURED | NO BANK GUARANTEE | NOT A BANK DEPOSIT | MAY LOSE VALUE | NOT SIPC PROTECTED | NOT INSURED BY ANY GOVERNMENT AGENCY

The products and services available through the WisdomTree Prime app and WisdomTree Connect are not endorsed, indemnified or guaranteed by any regulatory agency.

## **Cautionary Statement Regarding Forward-Looking Statements**

This press release may contain a number of “forward-looking statements” as defined in the Private Securities Litigation Reform Act of 1995. These forward-looking statements include, but are not limited to, statements about our ability to achieve our financial and business plans, goals and objectives and drive stockholder value, including with respect to our ability to successfully implement our strategy relating to WisdomTree’s Model Portfolios and Investment Strategies for SMAs, and other risk factors discussed from time to time in WisdomTree’s filings with the Securities and Exchange Commission (“SEC”), including those factors discussed under the caption “Risk Factors” in our most recent annual report on Form 10-K, filed with the SEC on February 26, 2025, and in subsequent reports filed with or furnished to the SEC. These forward-looking statements are based on WisdomTree’s management’s current expectations, estimates, projections and beliefs, as well as a number of assumptions concerning future events. These forward-looking statements are not guarantees of future performance, conditions or results, and involve a number of known and unknown risks, uncertainties, assumptions and other important factors, many of which are outside WisdomTree’s management’s control, that could cause actual results to differ materially from the results discussed in the forward-looking statements. Forward-looking statements included in this release speak only as of the date of this release. WisdomTree does not undertake any obligation to update its forward-looking statements to reflect events or circumstances after the date of this release except as may be required by the federal securities laws.

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