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WisdomTree Launches Platform to Help Advisors Grow and Scale Their Business

Firm introduces new digital portfolio construction tool, powered by FinMason

NEW YORK, Oct. 31, 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, has launched the WisdomTree Advisor Solutions platform, focused on providing technology-enabled solutions to help advisors grow and scale their business.

The WisdomTree Advisor Solutions program includes:

- Investment research and ETF education;
- Portfolio construction services;
- ETF Model Portfolios;
- Practice management resources, including access to thought leaders in retirement planning, leadership and behavioral finance; and
- Wealth management technology via AdvisorEngine, a customizable end-to-end platform for advisors. Offering includes access to Kredible by AdvisorEngine, an online credibility optimizer.

Kurt MacAlpine, WisdomTree Head of Global Distribution, said, "The asset management industry is undergoing rapid change, and technology is disrupting the way advisors do business. Advisors face many challenges such as accelerating regulatory reform, evolving client needs and pressure on fees. The WisdomTree Advisor Solutions program is designed to help advisors navigate these challenges while continuing to scale their businesses."

Portfolio Construction Services to Include Digital Portfolio Developer (DPD)

WisdomTree's Portfolio Construction Services offering has both human and digital elements, depending on an advisor's needs. For more complex issues, advisors can work with WisdomTree's team of asset allocation specialists who can provide portfolio analysis and help advisors consider potential ways to solve for a broad array of investment goals.

For on-demand analysis, WisdomTree launched the Digital Portfolio Developer (DPD), an enhanced portfolio construction tool for financial advisors. Through this application, advisors simply enter the holdings of an existing investment portfolio and the DPD will analyze the data and provide alternative portfolio approaches for an advisor to consider in seeking to improve outcomes based on different measures.

MacAlpine added, “Portfolio construction and asset allocation services have become critically important to an advisor’s investment process. WisdomTree is committing to helping advisors build better portfolios, whether it’s through our team of asset allocation specialists or through this new digital offering.”

Key features of the tool:

- **Stress Testing Scenarios**: Utilizing institutional-grade analytics delivered by FinMason, a FinTech and investment analytics firm, advisors can compare the hypothetical returns of an original portfolio and a proposed portfolio during different market scenarios such as a financial crisis or Federal Reserve rate hike.
- **Compare Portfolios**: Advisors can input and compare two portfolios side-by-side based on key metrics to help the advisor determine underlying risks and seek opportunities to improve performance, income and/or fees.
- **Open Architecture Platform**: The tool includes more than 25,000 mutual funds and ETFs with holdings-level analysis and real-time calculations.
- **Usability**: Advisors can access the DPD on-demand and at no cost to use the tool. In addition, advisors can save their analysis, download reports, and export example trade tickets based on the output.

David Yates, WisdomTree Chief Information Officer, said, “WisdomTree is committed to providing advisors with useful digital applications backed by high-quality analytics. The Digital Portfolio Developer provides an additional perspective to help advisors quickly and easily analyze client and prospect portfolios. In addition, the incorporation of FinMason’s powerful platform allows advisors to evaluate performance and conduct certain stress tests, such as how a portfolio may fare during hypothetical market events.”

Advisors can learn more about WisdomTree’s Portfolio Construction Services and Digital Portfolio Developer here, which also includes important information and disclosures that an advisor should read and consider prior to use.

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 $47.5 billion in assets under management globally. For more information, visit our Investor Relations website.

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