



THE NEXT STEP IN INVESTMENT EVOLUTION: MODEL PORTFOLIOS



SOLVING YOUR CHALLENGES THE NEXT STEP IN INVESTING

Investors today face a number of challenges. Market volatility, geopolitical turmoil, and Fed Policy uncertainty can impact the performance of almost any investment. But investors also face challenges from the investments themselves including costs, performance potential and investment overlap.

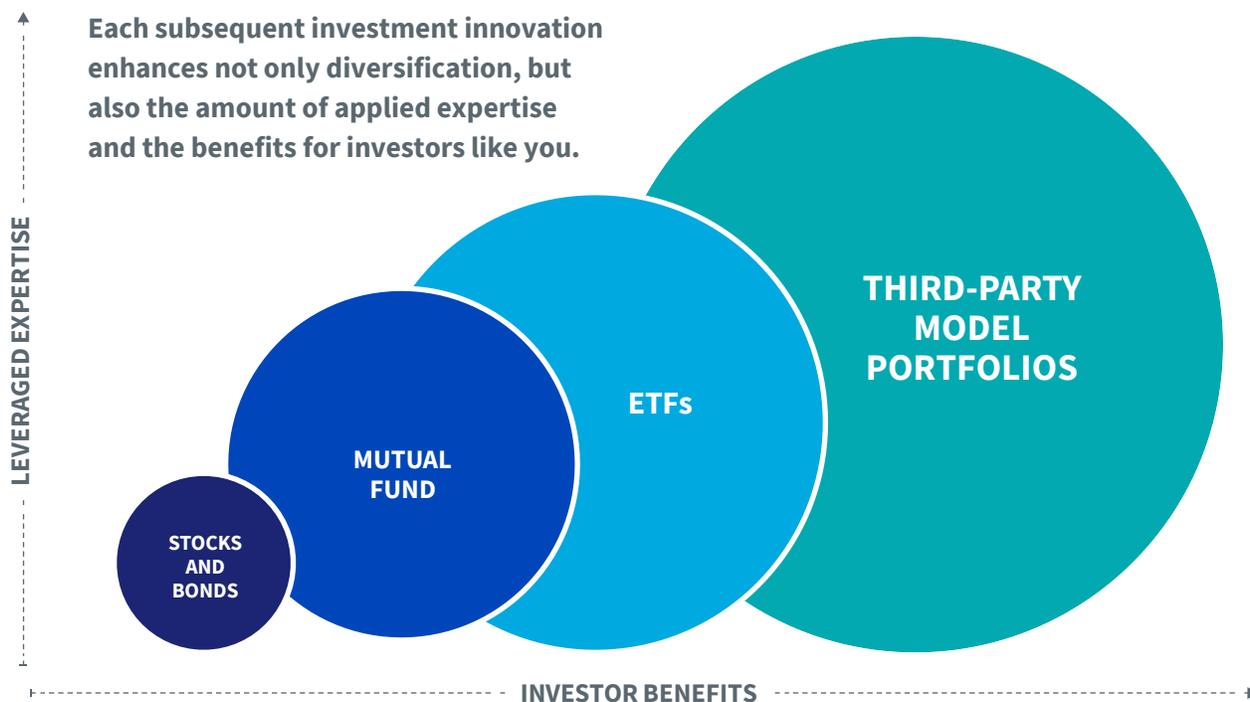
The model advantage

Third-party asset allocation model portfolios attempt to solve a number of investor challenges, providing:

- Broad diversification in a single model portfolio
- Enhanced performance potential
- A range of options for your advisor to consider to help meet your investment objectives and risk profile

Third-party models also enable your advisor to leverage the experience of teams of PhDs, CFAs and other experienced professionals focused on researching and building model portfolios. They are, put simply, the next step in investment evolution.

An evolved solution



Historically, most advisors would pick stocks and bonds for your portfolio, relying solely only on their own knowledge and experience. With the advent of each subsequent investment evolution, your advisor has been able to provide you with ever-increasing expertise and other advantages:

- Mutual funds provide the additional expertise of management teams and increased diversification
- ETFs took the advantages of mutual funds further by providing daily transparency, intraday liquidity, enhanced tax efficiency, lower costs, no minimum investments and more
- Third-party model portfolios can not only allocate to each of these investment types, but also offer a wealth of experience in asset allocation and research to provide complete diversification and asset allocation in single model portfolios designed to be used as a resource for an advisor to help meet investor risk and return goals

Diversification does not eliminate the risk of experiencing investment losses.

HOW YOUR ADVISOR FINDS THE RIGHT PORTFOLIO FOR YOU

Decades ago, if you went to the doctor with an issue they could not identify, they might be limited to the few other local doctors they knew when trying to find the answer—and they may not always have been able to find the treatment that was in your best interests. Today, however, your doctor has access to specialists around the world and is able to leverage artificial intelligence (AI) networks containing millions of medical records and case studies to assist in diagnosis and successful treatment outcomes. Third-party models provide this same type of solution for your advisor.

Developing the right solution for you

Your advisor can search the investment universe for the additional expertise they believe can help meet your distinct needs. They select the model portfolio they interpret to best align with your needs and customize based on your situation to deliver a complete asset allocation solution in one portfolio designed to help you achieve your distinct goals.



WHAT IS ASSET ALLOCATION?

Asset allocation is deciding where to put your money to work in the markets. While the original definition discussed only stocks, bonds and cash, today, asset allocation can include alternative assets like real estate and managed futures. It also includes geographies, like international, emerging and domestic markets, as well.

INCOME FOR THE LONG RUN

WisdomTree is a global asset manager with a track record of innovation, competitive performance and thought leadership. WisdomTree ETFs and models combine the performance potential of active management, with the benefits of passive management to create innovative strategies built for performance.

Extensive expertise working for you

WisdomTree's Model Portfolio resources include a Model Portfolio Investment Committee with more than 150 years of collective Wall Street, asset management and portfolio management experience and a global Asset Allocation Team with deep knowledge in every major asset class. The team consists of more than 15 investment professionals who meet regularly to discuss the latest developments in global financial markets and other macroeconomic issues that may impact the Model Portfolios.



Professor Siegel and WisdomTree

WisdomTree's Senior Economist, Dr. Jeremy Siegel, is not only the Russell E. Palmer Emeritus Professor of Finance at The Wharton School of the University of Pennsylvania, but he is also an industry legend. In fact, his most widely read work, *Stocks for the Long Run*, provided investors with a new paradigm for investing and building wealth in the 21st century and was named as one of the 10 best investment books of all time by *The Washington Post*. Dr. Siegel serves on the Model Portfolio Investment Committee and is also a voting member for the models bearing his name.

THE SIEGEL-WisdomTree MODEL PORTFOLIOS

WisdomTree and Professor Siegel have come together to apply his tenets to model portfolios. Designed to outperform the most common traditional model portfolios (60% equities/40% bonds) in a risk-smart way, these ground-breaking models allocate more to equities than fixed income and tilt toward factors like dividend yield¹ and low price-to-earnings² ratios. As a result, they can offer the potential for:

- Enhanced income and return to help maintain lifestyles
- Increased tax efficiency to help you keep more of what you make³⁴
- Lower risks and downside potential
- A focus on longer time horizons to match longer lifespans
- Diversification on a global scale

<p>SIEGEL-WisdomTree GLOBAL EQUITY MODEL</p>  <p>100% Equity</p> <p>Use case: Advisors seeking to align their clients' investments with the core principles of Professor Jeremy Siegel and WisdomTree.</p>	<p>SIEGEL-WisdomTree LONGEVITY MODEL</p>  <p>75% Equity 25% Fixed Income</p> <p>Use case: Advisors seeking an alternative to a traditional 60/40 portfolio for balancing income needs with longevity risk</p>
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Weights subject to change.

¹ Dividend yield: A financial ratio that shows how much a company pays out in dividends each year relative to its share price.

² Price-to-earnings (P/E) ratio: Share price divided by earnings per share. Lower numbers indicate an ability to access greater amounts of earnings per dollar invested. A higher number indicates that a company's stock is overvalued.

³ ETFs are known to be more tax efficient than mutual funds due their secondary trading and in-kind create/redeem process.

FINDING THE RIGHT MODEL PORTFOLIO FOR YOU

Third-party model portfolios can provide a number of advantages to advisors as they work with their clients to determine a portfolio to fit their unique circumstances. Not only do they bring extra experience to your portfolio, but they can also help enhance performance potential, reduce risks and help you generate more income.

But all model portfolios are not created equal—and they are not all appropriate for everyone.

Contact your financial advisor to learn more about the WisdomTree Siegel Model Portfolios and to discover which model portfolio may be right for you.

Diversification does not eliminate the risk of experiencing investment losses. Using an asset allocation strategy does not assure a profit or protect against loss. Investors should consider their investment time frame, risk tolerance level and investment goals.

There are risks associated with investing, including the 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. For non-WisdomTree funds, please visit the appropriate third-party website. Please read the prospectus carefully before you invest.

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.

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.

Financial professionals/advisors using WisdomTree model portfolios have the ability to include a non-WisdomTree logo in the lower portion of the cover of this document. To the extent any such logo is included, WisdomTree has not reviewed the logo, its content or messaging and is not responsible or liable for such logo, its content or messaging. Further, it should not be considered a recommendation or endorsement by WisdomTree of any firm named or other information in any such logo.

WisdomTree primarily uses WisdomTree Funds in the Model Portfolios unless there is no WisdomTree Fund that is consistent with the desired asset allocation or Model Portfolio strategy. As a result, WisdomTree Model Portfolios are expected to include a substantial portion of WisdomTree Funds notwithstanding that there may be a similar fund with a higher rating, lower fees and expenses, or substantially better performance. Additionally, WisdomTree and its affiliates will indirectly benefit from investments made based on the Model Portfolios through fees paid by the WisdomTree Funds to WisdomTree and its affiliates for advisory, administrative and other services.

Jeremy Siegel serves as Senior Economist to WisdomTree, Inc., and its subsidiary, WisdomTree Asset Management ("WTAM" or "WisdomTree"), and serves on the Asset Allocation Committee of WisdomTree, which develops and rebalances WisdomTree's Model Portfolios. In serving as a consultant 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. The Siegel-WisdomTree Longevity Model Portfolio seeks to address increasing longevity by shifting the focus to potential long-term growth through a higher stock allocation versus more traditional "60/40" portfolios.

The WisdomTree Model Portfolio Investment Committee is also sometimes referred to as the Asset Allocation Committee.

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