



WisdomTree and PIMCO Collaborate on ETF Model Portfolios

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WisdomTree Remains Focused on Open Architecture ETF Model Portfolios for Financial Advisors

Models Available in the Model Market Center on the TD Ameritrade Institutional Platform and through AdvisorEngine

NEW YORK, Oct. 12, 2018 (GLOBE NEWSWIRE) -- WisdomTree Investments, Inc. (NASDAQ: WETF), an exchange-traded fund ("ETF") and exchange-traded product ("ETP") sponsor and asset manager, and PIMCO, a leading global investment management firm, announced today that the two firms are collaborating¹ on three WisdomTree ETF model portfolios in which PIMCO's fixed income ETFs will be added. These ETF model portfolios are available to advisors in the Model Market Center on the TD Ameritrade Institutional Platform and through AdvisorEngine.

"We're thrilled to collaborate with PIMCO, a leader in fixed income investing, to provide advisors with best-in-class model portfolios. WisdomTree is focused on developing solutions that align with advisor preferences – for instance, we know advisors typically prefer to use investment products from multiple managers and, as a result, we've prioritized taking an open architecture approach when it comes to our models," said Tom Skrobe, WisdomTree Head of Client Solutions.

Eric Mogelof, MD, Head, U.S. Global Wealth Management for PIMCO, added, "We are excited that ETFs from PIMCO's suite will be included in WisdomTree's models. We believe that financial advisors will benefit from this collaborative effort."

Financial advisors are increasingly utilizing model portfolios that are created in-house or by third-party asset managers. There are a variety of reasons an advisor may want to use model portfolios as a resource as they seek to achieve their clients' financial goals. Even with sophisticated in-house tools and expertise, building and analyzing portfolios can take a significant amount of time and other aspects of an advisor's services can often take higher priority.

Skrobe continued, "ETF model portfolios allow advisors to access cutting-edge portfolio construction tools with the potential ability to manage assets in a more efficient way. As a result, advisors can spend more time building quality relationships with clients and prospects."

WisdomTree's ETF model portfolios are designed to give investors a unique way to access the global markets, going beyond basic market-cap weighted indexes. With risk profiles ranging from conservative to aggressive, the models incorporate WisdomTree's Modern Alpha™ approach, combining the outperformance potential of active management with the benefits of the ETF structure.

Learn more about WisdomTree's ETF model portfolios [here](#).

¹Pacific Investment Management Company LLC ("PIMCO") and WisdomTree engage in periodic informational meetings pertaining to PIMCO ETFs and WisdomTree's use of fixed income ETFs in its models. Although the firms' collaboration is intended to help inform WisdomTree in its potential inclusion/usage of PIMCO ETFs in WisdomTree model portfolios, WisdomTree is under no obligation—contractual or otherwise—to include PIMCO ETFs in WisdomTree model portfolios, and any allocation to PIMCO ETFs in WisdomTree model portfolios may change at any time and without notice to PIMCO.

PIMCO is not affiliated with WisdomTree, TD Ameritrade or AdvisorEngine. PIMCO DOES NOT ENDORSE, SPONSOR, MANAGE OR OVERSEE WISDOMTREE'S MODEL PORTFOLIOS OR THE CONTENT OF WISDOMTREE'S MARKETING MATERIAL OR WEBSITE AND MAKES NO ENDORSEMENT—EXPRESS OR IMPLIED—ABOUT THE ADVISABILITY OF ALLOCATING ASSETS PURSUANT TO WISDOMTREE'S MODEL PORTFOLIOS. PIMCO DOES NOT ENDORSE, SPONSOR, OR OVERSEE the Model Market Center on the TD Ameritrade Institutional platform. For more information about the PIMCO ETFs currently included in WisdomTree's model portfolios, contact your PIMCO representative; for more information about WisdomTree's model portfolios, contact your WisdomTree representative.

TD Ameritrade is separate from and not affiliated with WisdomTree or PIMCO and has not been involved in the verification of this material and is not responsible for, nor any endorsement of services, opinions, facts, products or policies should be inferred.

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TD Ameritrade receives remuneration from ETFs and mutual funds and/or their managers that participate in the MMC for administrative and/or other services.

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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 \$58.3 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 PIMCO

PIMCO is one of the world's premier fixed income investment managers. With our launch in 1971 in Newport Beach, California, PIMCO introduced investors to a total return approach to fixed income investing. In the 45+ years since, we have continued to bring innovation and expertise to our partnership with clients seeking the best investment solutions. Today we have offices across the globe and 2,150+ professionals united by a single purpose: creating opportunities for investors in every environment. PIMCO is owned by Allianz S.E., a leading global diversified financial services provider.

About AdvisorEngine

[AdvisorEngine](#) is a financial experience company that provides an end-to-end client relationship and digital investment platform for registered financial advisors. Founded in 2014 by a team of experienced financial and technology executives, AdvisorEngine was the first company to integrate private-label robo-advice within a digital wealth management platform. With an emphasis on data, design thinking and technology, the firm delivers a unified experience across three core groups – clients, advisors, and business management teams – to address the most common pain points felt by rapidly growing advisory firms.

With offices in New York City and Raleigh, NC, AdvisorEngine continues to innovate to keep advisors at the forefront of wealth management. For more information, please visit www.advisorengine.com.

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