

Adhesion ETF Essentials: Build Robust, Cost-Effective Portfolios

ETF Essentials by Adhesion Wealth provides simple, ready-to-use ETF investment models with zero platform fees.* The program makes it easier to build and manage client portfolios, and helps scale your businesses efficiently, by connecting you with ETF strategies from WisdomTree and Innovator Capital via the Adhesion Wealth platform.

1

No Platform Fees

Access to investment product with zero Adhesion platform fees.*

2

Scale

Flexibility to invest across multiple custodians ETF portfolios across multiple custodians.

3

Choice

ETF providers with managed portfolios offering strategic asset allocation and downside protection.

Lower costs, simplify portfolio management & efficiently support client investment needs.

WisdomTree

A Leader in Core Market Exposure

Globally recognized ETF provider known for strategies offering broad market access with a strategic focus on factor-based investing, designed to enhance diversification and risk-adjusted returns.

“Our collaboration with Adhesion reflects our shared commitment to helping advisors deliver institutional-quality, tax-aware portfolios at scale. Essentials brings the power of WisdomTree’s model portfolio expertise directly into the advisors’ hands, enabling them to elevate their investment offerings without increasing cost or complexity.”

Kara Dombroski

Head of Business Mgmt & Strategy, Portfolio Solutions
WisdomTree

Innovator Capital

Pioneers in Defined Outcome Investing

Innovator ETFs specialize in defined outcome investing and downside protection strategies, offering advisors tools to manage risk and market participation with confidence.

“We believe investors should not be forced to choose between growth and protection. They should be allowed to participate in market gains without unnecessary worry. That’s the goal behind our suite of buffer ETF model portfolios: to deliver predictable downside protection and market upside, packaged as a scalable, turnkey solution.”

Tim Urbanowicz, CFA

Chief Investment Strategist
Innovator Capital

Contact Your Relationship Manager for more details or rmteam@adhesionwealth.com

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IMPORTANT INFORMATION

This is for informational purposes only, is not a solicitation, and should not be considered investment, legal or tax advice. The information has been drawn from sources believed to be reliable, but its accuracy is not guaranteed and is subject to change.

Investing involves risk, including the possible loss of principal. Past performance does not guarantee future results. UMAs and investment solutions are not suitable for all investors and should be evaluated for suitability by financial professionals prior to investing.

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

Innovator ETFs are distributed by Foreside Financial Services, LLC.

The Adhesion Essentials program represents professionally managed models provided by Managers with established registered investment funds (primarily ETF and Mutual Funds). Adhesion invoices and receives a fee from these providers for maintaining these models. The program typically has no additional fees deducted from your account. However, if financial advisors enroll accounts in this program, financial advisors may still be subject to an Overlay Portfolio Management fee.* Accounts enrolled in the ETF Essentials program are still subject to the underlying internal expense ratio of funds represented in the model. For more complete information about the various investment solutions available, including the investment objectives, risks, and fees, please refer to the Disclosure Brochure. Please read it carefully before investing. For a copy, please contact Adhesion. Adhesion Wealth Advisor Solutions ("Adhesion") is an investment adviser registered with the U.S. Securities and Exchange Commission ("SEC"). WisdomTree, Innovator ETFs and Adhesion are separate and unaffiliated companies. Each party is responsible for their own content and services.

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