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AssetMark Launches Complete Wealth Management Solutions and Resources

Initiative Provides Custom Investment Offering for Advisors Serving High-Net-Worth Investors

CONCORD, CA — [July 6, 2017] — AssetMark, Inc., a leading provider of innovative investment and consulting solutions, today announced the launch of "Complete Wealth Management," a set of solutions designed to help advisors better serve high-net-worth clients. Affluent investors require a holistic financial planner who can manage every aspect of their complicated financial lives, and Complete Wealth Management offers advisors the resources and tools to meet those comprehensive needs.

The Complete Wealth Management offering is supplemented by the launch of a new ePaper, "Growing Your Practice Through High-Net-Worth Investors," which provides insights on this demographic's unique characteristics. For example, the ePaper describes high-net-worth clients' preferred communication and investing styles, while highlighting service offering strategies advisors can employ to attract and retain this important market segment. The ePaper also sheds light on the imminent rise of Generations X and Y clients in the high-net-worth demographic.

"As advisors face increasing competitive pressure, expanding their capabilities for high-net-worth clients is more important than ever," said Natalie Wolfsen, EVP and Chief Commercialization Officer for AssetMark. "These resources will give them the knowledge set, tools and product offerings needed to provide the holistic financial advice high-net-worth investors require and demand."

The Complete Wealth Management offering includes three primary components: Cash Management resources, Wealth Services, and Custom Investments:

Cash Management
Advisors can utilize this new product offering and educational resources to take a leading role in all aspects of a high-net-worth investors' cash management by recommending banking and lending products, such as checking accounts, securities-backed lines of credit, concierge mortgage services and expanded FDIC insurance on cash assets.

Wealth Services
Advisors can access tools to help investors with significant assets manage their estate planning and develop a full wealth transfer strategy to establish their legacy**.**

Custom Investments
Additionally, advisors can access a number of custom investment strategies specifically targeted to high-net-worth clients. A full list of strategists on the AssetMark platform suited for high-net-worth investors can be found here.

About AssetMark, Inc.

AssetMark, Inc. is a leading independent provider of innovative investment and consulting solutions serving financial advisors. The firm provides investment, relationship and practice management solutions that advisors use to help clients achieve their investment objectives and life goals. AssetMark, Inc., including its Savos and Aris divisions, has more than $36 billion in assets on its platform and a history of innovation spanning over 20 years. For more information, visit www.assetmark.com and follow @AssetMark on Twitter.

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