AssetMark Unveils Enhanced Client Proposal and New PortfolioReview for Financial Advisors in Virtual Age

Interactive, Zoom-Ready Advice Delivery and Client Review Tools Deepen Advisor-Investor Interactions and Trust

Concord, Calif.—September 23, 2020—AssetMark (NYSE: AMK) today announced two new digital capabilities, its enhanced Client Proposal and new PortfolioReview tools, to help financial advisors drive deeper advisor-client interactions in their digital journey. With the new ability to present client proposals and portfolio reviews in elegant, interactive fashion during virtual conferences, advisors can attain and demonstrate a thorough understanding of their clients' needs resulting in increased client trust and deeper advisor-client relationships.

"AssetMark's enhanced Client Proposal and new PortfolioReview tools will dramatically improve the advice delivery and portfolio monitoring stages of advisors' digital journey with their clients on the AssetMark platform. In the current environment it is critically important for advisors to be able to efficiently review with investors their portfolio allocations and ensure they meet client needs in a compelling way," said Michael Raneri, Chief Digital Innovation Officer at AssetMark. "With these cutting-edge features, advisors and their clients can establish the deeper levels of understanding, trust, and informed decision making that lead to greater client satisfaction and growth, even during high market volatility."

The Enhanced Client Proposal

The enhanced Client Proposal takes advice delivery to a new, personalized level, empowering advisors to clearly demonstrate how the data-driven strategies proposed are chosen based on their client's goals, concerns, and financial dreams. By creating more opportunities for holistic advisor-client discussions, the enhanced proposal can dramatically improve prospect engagement and help advisors differentiate their value.

Visually appealing and deeply informative, the enhanced Client Proposal showcases a client's personal portfolio recommendation in a clear, compelling, and concise format. Advisors can present personalized financial analysis and investment recommendations in a clear, easy-to-navigate format with an intuitive and innovative design. Easily updatable, Client Proposal allows advisors to quickly toggle between different benchmarks and strategies to help investors make more informed, confident decisions, which also helps set the right tone for future discussions--particularly during times of uncertainty.

The New PortfolioReview

PortfolioReview is an innovative feature on the AssetMark digital platform that improves the portfolio monitoring experience through a dynamic, interactive review that supports deeper client engagement. Specifically designed to maximize the real-time virtual engagement of Zoom and other virtual conferencing applications, PortfolioReview encourages richer advisor-client discussions.

Advisors have the option to expand or collapse detailed views, making it easy to dig into details or provide a more holistic view, as needed. With the various data-driven views provided by PortfolioReview, advisors can easily present different time frames, market and portfolio benchmarks, and market/life event impacts that help educate clients and deepen their understanding, confidence, and overall satisfaction.

To learn more about AssetMark's Enhanced Client Proposal and New PortfolioReview, please click here.

About AssetMark Financial Holdings, Inc.

AssetMark is a leading provider of extensive wealth management and technology solutions that power independent financial advisors and their clients. Through AssetMark, Inc., its investment adviser subsidiary registered with the U.S. Securities and Exchange Commission, AssetMark operates a platform that comprises fully integrated technology, personalized and scalable service, and curated investment solutions designed to help advisors and their clients thrive. AssetMark had $63.2 billion in platform assets as of June 2020 and has a history of innovation spanning more than 20 years. For more: assetmark.com.

SOURCE: AssetMark, Inc.

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