AssetMark Kicks Off Fall with New Marketing and Investor Education Tools for Financial Advisors

New Slate of Investor-Facing Webinars and Downloadable Marketing Tools Can Help Advisors Better Promote Their Services while Demonstrating Value for Faster Growth

Concord, Calif.—September 30, 2020—AssetMark (NYSE: AMK) today announced the launch of an investor-focused webinar series, complete with marketing resources to promote them, that advisors can tap into to address challenges brought on by the pandemic, drive client satisfaction, and grow their businesses. These plug-and-play educational campaigns, which complement additional resources available to advisors on the AssetMark platform, include:

- Guide to building a smart, simple marketing plan
- Sample marketing calendar
- Resources and tips for engaging virtually with clients
- Series of webinars tailored for investors
- Brochures highlighting the advantage of working with a financial advisor

A recent J.D. Power Wealth Management Insight report found only 12% of advisory clients have engaged with advisors through video conference during COVID-19, even though 73% say they use digital communication platforms. To help advisors adopt remote or socially-distanced interactions, AssetMark's suite of marketing resources include guidance on how advisors can leverage various technologies to engage and market to clients and prospects in new ways, virtually.

"Without the in-person interactions that financial advisors typically rely on to engage clients and prospects alike, many may be trying to master new technologies or formulate new ideas to maintain client service levels and grow their business through the pandemic," said Michael Kim, Chief Client Officer at AssetMark. "Because AssetMark is in the business of helping advisors grow, no matter what the challenge, we've launched new marketing resources, coupled with educational investor-facing webinars, specifically designed to help advisors demonstrate value and regain control over the future of their businesses in this new socially-distant reality."

The downloadable resources were made available as part of the Growing Your Business with AssetMark webinar, which introduced AssetMark's Fall Focus campaign, a seasonal line-up of webinars to which advisors can invite clients and prospects to attend various topics, including retirement planning, the election and its potential impact on the market, and more. Each event includes its own downloadable marketing and communications plan, sample invitations, and outreach suggestions that advisors can leverage to attract client and community participation.

"AssetMark's Fall Focus events were designed to provide advisors with ready-to-share educational materials that help them connect with their ideal clients and deepen engagement in meaningful ways," added Mr. Kim. "Each event reinforces the value of working with a financial advisor so advisors can continue to articulate their value to clients and attract new prospects."

To learn more about AssetMark's Fall Focus and download the new marketing resources, please visit assetmark.com/fall-focus.

About AssetMark Financial Holdings, Inc.

AssetMark is a leading provider of extensive wealth management and technology solutions that help financial advisors meet the ever-changing needs of their clients and businesses. Through AssetMark, Inc., its investment adviser subsidiary registered with the U.S. Securities and Exchange Commission, AssetMark operates a platform that brings together fully integrated technology, personalized and scalable service, and curated investment solutions to support financial advisors and their businesses. For more than 20 years, AssetMark has focused on offering the solutions and services that help financial advisors grow. AssetMark had $63 billion in platform assets as of June 30, 2020. For more information visit assetmark.com.

SOURCE: AssetMark, Inc.

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