



ASSETMARK®

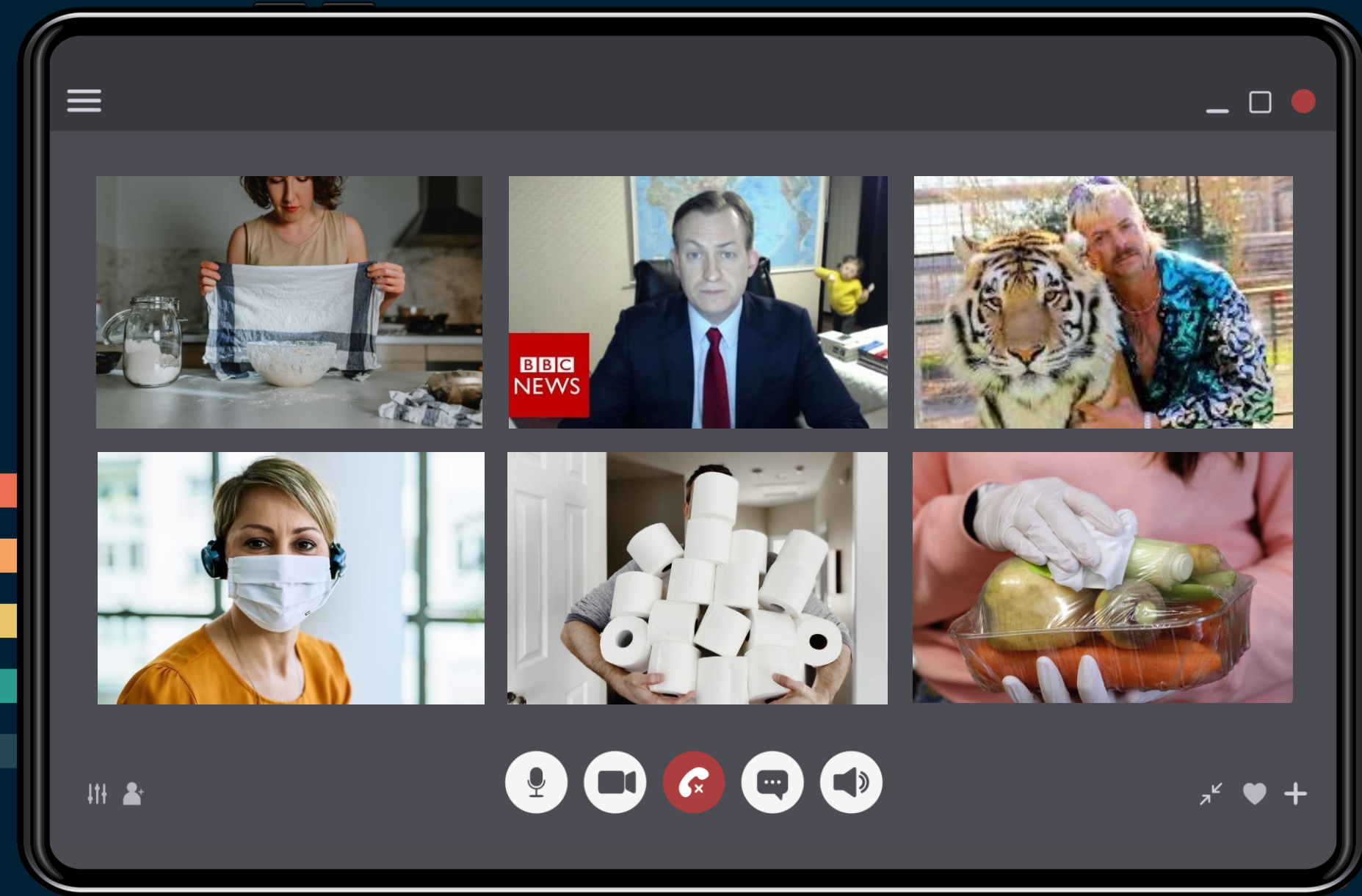
GOLDFORUM

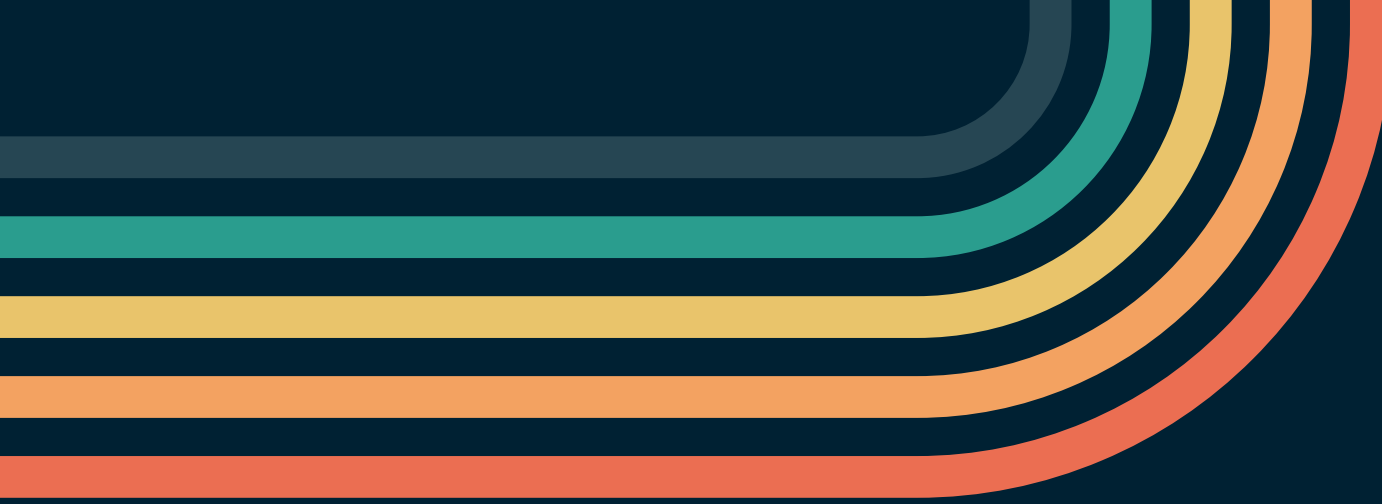
GO BEYOND



Welcome to
Marco Island

We all had to adapt and pivot





You went
beyond
expectations





Skillset

+ Mindset

GO
BEYOND



SKILLSET

determines what you do **now**

MINDSET

determines what you do **next**

- ADAM GRANT

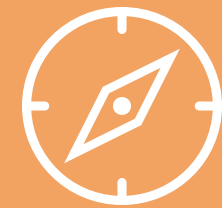
**GREAT WEALTH
TRANSFER**

**SUCCESSION
PLANNING**

**A.I.
REVOLUTION**

Mindset determines what you can do **next**

Skillset determines what you can do **now**



Bring **curiosity**



Drive **innovation**



Play **to win**



Are you Ready for Great Wealth Transfer?

\$100T+

of assets in motion to next generation and heirs

80%+

of Millennials will seek a different financial advisor from their parents

HOLISTIC,
planning oriented services will key to successful wealth transfer strategies

Advisor Succession Opportunities

There are more advisors over **70** than **under 30**

40% of our advisors at AssetMark
are **60 and older**

Continuity planning

is a top goal for yourself and for your clients



AI is revolution, not evolution

100+

MILLION USERS

signed up for ChatGPT
in less than 2 months
after its public launch

70%

OF FINANCIAL ADVISORS

reported using some type
of AI technology in 2025

77%

OF FINANCIAL ADVISORS

believe AI will
enhance productivity

Our goal is to help you
bring the winning **mindset**

Bring your
curiosity

Drive
innovation

Play
to win



IMPORTANT INFORMATION

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