



ASSETMARK®

GOLDFORUM

GO BEYOND



Scan for
Party Details
at Lou's Place!





The people that
mattered

Family

Physical Health

Financial Health



2020

MARCH 12



Black Thursday

Dow dropped 2,352 points (9.9%), setting a new record¹

MARCH 23



S&P 500 fell 33.9%

from 3,386.1 on February 19 to 2,237.4 on March 23²

APRIL 2020



U.S. unemployment quadrupled

from 3.5% in February 2020 to 14.7% in April 2020³

1. The Street, Nov 10th 2020
2. arXV
3. Science Direct Jan 2012



Navigating Life's Transitions

The **Post-Covid** Transformation

**30%
down**



on business travels
pending from
pre-pandemic levels¹

**19.6%
record high**



national office vacancy
rates in Q3 2024²

**16%
fully remote**



U.S. companies
now vs. essentially
0% pre-pandemic³

**300+
million**



Zoom daily meeting
participants up from
10M in December 2019⁴

1. Moody's Analytics/CBRE (reported widely in commercial real estate industry publications)
2. Moody's Analytics/CBRE (reported widely in commercial real estate industry publications)
3. Forbes Advisor survey (2023-2024)
4. Zoom's own reported metrics/investor presentations

The Speed of **Disruption**

78%
of companies

in 2024 adopted AI, a nearly 4x growth from 20% in 2017

\$1.81
trillion

projected Global AI market value in 2030 from \$391 billion in 2025

41%
global work tasks

could be automated by 2030, affecting 1.2 billion workers worldwide

Our Changing Industry



100,000+ advisors will retire
in the next 7-10 years

The Human Element

A woman with long brown hair, wearing a light pink blazer, is sitting at a dark wooden table. She is smiling and looking towards a man. The man, wearing a light grey suit jacket, is sitting across from her, also smiling and looking at her. He has his hands clasped together. A silver laptop is open on the table in front of the woman. The background is a blurred office setting with large windows. The image is overlaid with several horizontal stripes in orange, yellow, and teal.

“AI won't replace financial advisors,
but financial advisors who use AI
will replace those who don't.”

In today's day and age
**if you're not
growing and
transforming**
you're dying



2025

A Year of Growth and
Transformation



Field Advisory Board Members



Elizabeth
Bennet
Cavalier



Peter
Falstad
Illinois



James
Lingelbach
SoCal



Bryan
Pecherek
Mid Atlantic



Bruce
Robertson
Texas



Bob
Bleier
Upstate NY



Charles
Harrison
Bay Area



Ryan
Marier
Ohio



Robert
Peller
NJ/NY



Jude
Wilson
Florida



Sanjay
Das
Seattle



Nicholas
Kennedy
Pennsylvania



Sandra
Maynard
Vermont



Suzette
Porter
Dallas/Austin

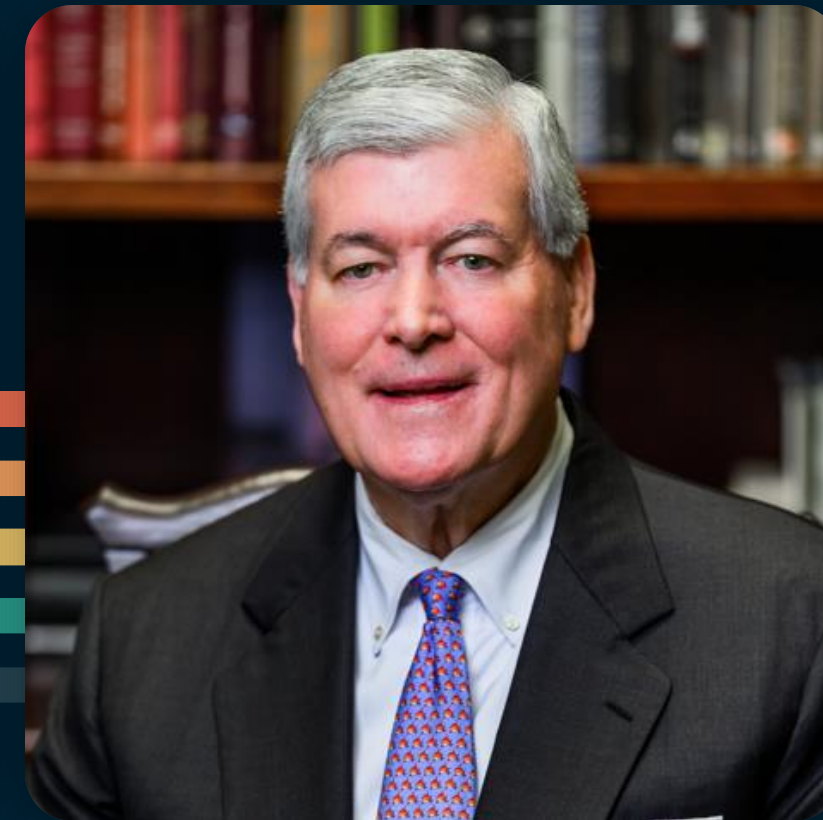


Dane
Winter
Denver

New FAB Members



Lori Baneck
Wisconsin



David Burch
Georgia



Suzanne Udoni
Wisconsin



THE YEAR OF GOING
BEYOND





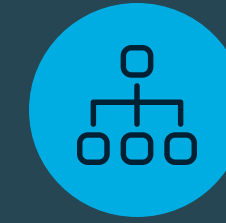
Wealth
Solutions
Expansion



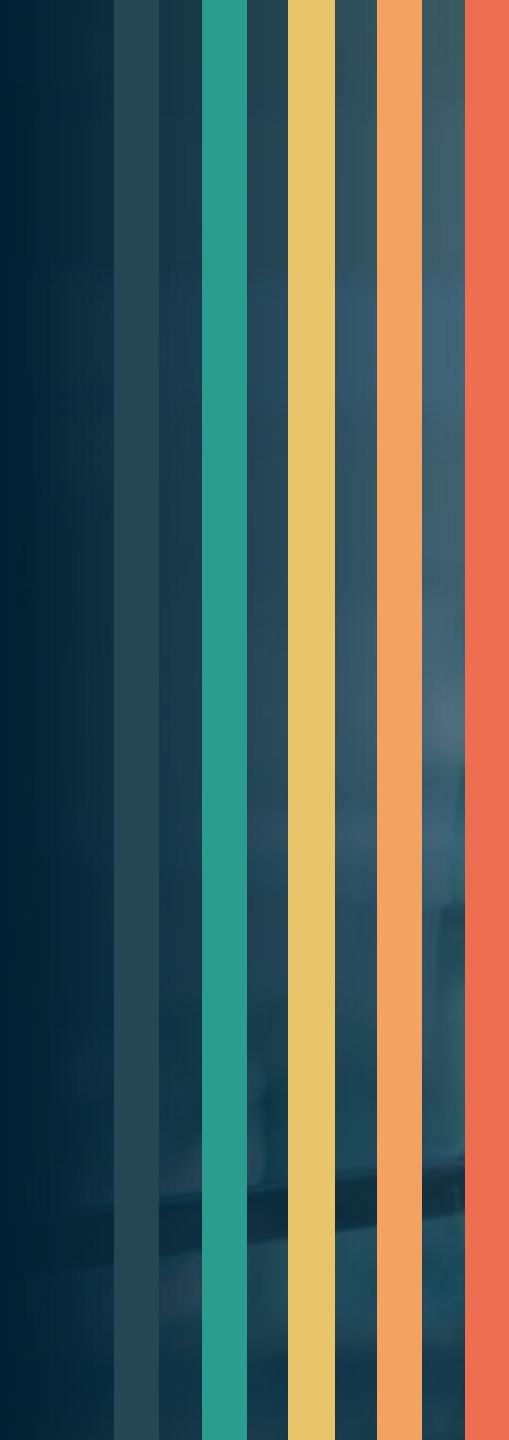
Advisor
Growth and
Productivity



Technology
and AI
Innovation



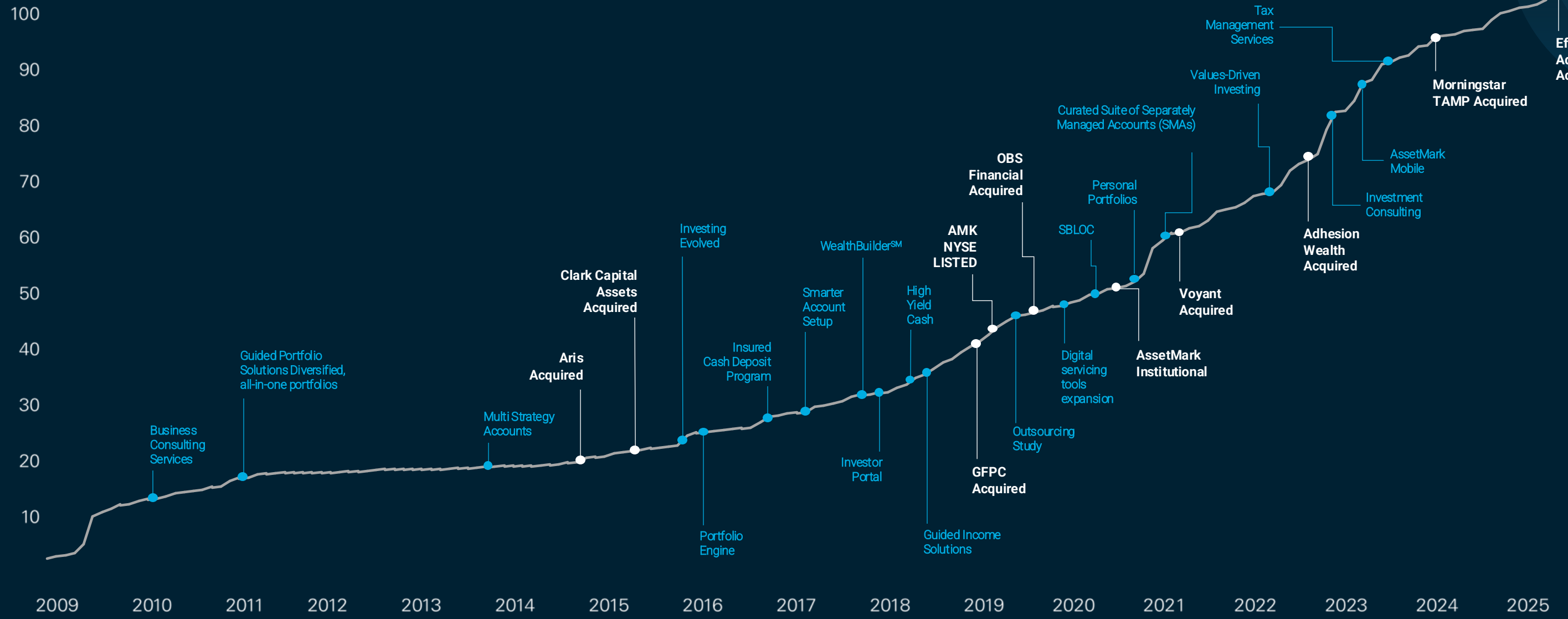
Organizational
Scale and
Service
Excellence



OUR MISSION:

**Make a difference in
the lives of advisors
and their clients**

\$ BILLION



\$166B



Our Commitment to Our Clients



* As of December 31, 2025

Relentless
Focus =

74

NPS Score



Our AssetMark Values: **Re-Calibrating the Mission**

WE BELIEVE IN

Leading with Heart

We truly make a difference in the lives of others: teammates, clients, investors and communities.

WE BELIEVE IN

Obsessing Over Client Success

We bring a relentless focus on what matters to clients that sets us apart and creates loyal, lasting relationships.

WE BELIEVE IN

Unyielding Integrity

We do the right thing, always. Even when it's hard.

WE BELIEVE IN

Collective Respect

We are authentic, inclusive and we value all voices while winning together.

WE BELIEVE IN

Operating with Excellence

We learn fast, continuously improve, innovate and collaborate to find new and better solutions.



Our Culture is What
Makes Us Different

Client Success and Heart



Client Success and Heart





Remember your
personal why

The Virtuous Cycle



IMPORTANT INFORMATION

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