

# Two Best-in-Class Platforms.

One Seamless Trust Accounting/Wealth  
Management Solution.



Serve the needs of clients with  
integrated capabilities designed  
to drive growth and add value.



## The Challenge

The wealth management ecosystem is evolving. Bank Trusts recognize the need to augment their services with wealth management, while an increasing number of Registered Investment Advisers (RIAs) are moving beyond wealth management and adding trust account services to their value proposition in an effort to capture wallet share.

Traditional service platforms lack the functionality to seamlessly support this evolution. Empowering firms to deliver both institutional trust and RIA-style investment services in one unified package is key to building operational efficiency and scale, while meeting the needs of sophisticated clients who demand comprehensive service.



## The Solution

Two of the industry's premier solution providers – AssetMark and Cheetah – have launched an exclusive collaboration to address this growing convergence of the RIA and bank trust channels. This new, cross-platform solution integrates two systems, offering unified user management, real-time workflows, and automated data reconciliation. The seamless connection features a holistic, single sign-on experience, ensuring consistent and accurate data across platforms while streamlining operations.

The AssetMark/Cheetah combined solution fuses Cheetah's leading trust accounting services with AssetMark's advanced wealth management capabilities. The integration of the two platforms is designed to give financial professionals the ability to seamlessly deliver unfragmented support to better serve the needs of investors with complex needs.

# AssetMark and Cheetah

Complementary Solutions. Best-in-Class Technologies. Customized Service.



- Modern cloud-based trust accounting system
- Comprehensive trust reporting and analytics
- Streamlined automated client onboarding, efficient tax services, timely asset pricing, portal and mobile experiences for clients
- Integrated with AssetMark via APIs



- Curated list of investment strategies and third-party managed solutions
- Robust portfolio management and trading tool
- Comprehensive market commentary and insights
- Powerful advisor tools, analytics and client proposal capabilities

One efficient, all-encompassing system at the intersection of trust administration and wealth management.

## Efficiency and Agility to Benefit Financial Professionals and Bank Trust Officers



### FINANCIAL PROFESSIONAL BENEFITS:

- Gives advisors more time back in the day to deepen client relationships
- Provides advisors a scalable solution to broaden their services in a cost-effective manner
- Builds efficiencies that drive business growth



### BANK TRUST OFFICER BENEFITS:

- Centralizes trust accounting services and wealth management
- Gives clients access to a multi-discipline, curated platform of investment solutions and planning capabilities
- Provides a digital, convenient and on-demand experience



## ABOUT ASSETMARK

*Founded in 1996, the AssetMark platform serves 10,700 financial advisors and roughly 317,000 investor households. As of December 31, 2024, the company had \$139.9 billion in platform assets.*

AssetMark operates a wealth management platform that powers independent financial advisors and their clients. Together with its affiliates Voyant and Adhesion Wealth, AssetMark serves advisors of all models at every stage of their journey with flexible, purpose-built solutions that champion client engagement and drive efficiency. The firm's ecosystem of solutions equips advisors with services and capabilities that would otherwise require significant investments of time and money, ultimately enabling them to deliver better investor outcomes and enhance their productivity, profitability and client satisfaction.



## ABOUT CHEETAH INC.

*Since its founding in 1987, Cheetah has offered financial professionals a modern, efficiency-building trust accounting system solution for sophisticated bank clients and the professionals who serve them.*

Cheetah provides software solutions for wealth managers focused on growing their business and building revenue. Cheetah's mission is to provide wealth managers with the tools they need to grow their business, provide exceptional service, and increase operational efficiency. The firm's flagship product, Cheetah, is a comprehensive wealth management platform that provides wealth managers with a digital solution to manage all aspects of their client's wealth, from investment management and trades to trust accounting and tax reporting.

For additional information, contact one of our Bank Trust Relationship Managers at [trust@assetmark.com](mailto:trust@assetmark.com).

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**Investing involves risk, including the possible loss of principal. Past performance does not guarantee future results.** Asset allocation cannot eliminate the risk of fluctuating prices and uncertain returns. There is no guarantee that a diversified portfolio will outperform a non-diversified portfolio. No investment strategy, such as asset allocation, can guarantee a profit or protect against loss. Actual client results will vary based on investment selection, timing, market conditions, and tax situation. It is not possible to invest directly in an index.

**For more complete information about the various investment solutions available, including the investment objectives, risks, and fees, please refer to the Disclosure Brochure and applicable Fund Prospectus. Please read them carefully before investing. For a copy, please contact AssetMark or Financial Advisor.**

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