Empowering trust departments and trust companies to grow, scale, and stay competitive in an evolving wealth landscape.

Through the combined capabilities of AssetMark and Cheetah, trust organizations can seamlessly integrate trust accounting and wealth management on a single, scalable platform—empowering you to expand into wealth management, drive revenue, and deliver curated investment solutions that keep you competitive.

Due Diligence

A background check for your investment solutions

Rigorous evaluation, continuous monitoring, and established standards ensure that only high-quality investment strategies make it onto the platform—and remain.

What Makes Us Different

As an experienced team of professionals , we have multiple eyes and ears on our managers' strategies to make sure no stone is left unturned. Our process is continuous. We don't stop when a strategy is added to the platform—that's just the beginning of the story. We speak with every one of our investment managers multiple times a year, check in on the 5 P's and determine whether everything is status quo or if there are concerns to address.

Our processes focus on thoroughly understanding the five P's of an investment manager: People, Philosophy, Process, Portfolio Construction, and Performance. We aim to know the strategy as well as the investment team running the strategy.

People

Experienced, tenured teams in stable organizations

Philosophy

Clearly defined, tried and tested investment approach

Process

Consistent, disciplined system applied in multiple market environments

Portfolio

Risk management is a key component of every strategy

Performance

Proof statement of philosophy, process and portfolio construction

Business Consulting: Turning Ideas Into Action

AssetMark's Business Consulting team partners with trust organizations to drive growth, improve efficiency, and strengthen client relationships. Through personalized guidance and data-driven insights, consultants help trust organizations tackle their most pressing business challenges.

Consultant for Growth - Data-driven insights and proven frameworks to scale your practice

Enhance Client Experience - Refine service models and deepen client relationships

Optimize Efficiency - Streamline processes and reclaim time for what matters most

Tailored Engagements - One-on-one or project-based

Strengthen Teams - Align roles, responsibilities, and performance goals

Support at Every Stage - From early diagnostics to onboarding, we help trust organizations move forward with confidence consulting designed for your priorities

Curated Solutions That Scale With Your Clients

Advisor-Managed

- Full portfolio construction flexibility
- Implement models with equities, mutual funds, and ETFs
- Efficient management across client accounts

Hybrid

- Complement your portfolios with AssetMark's unique solutions within a single household
- Range of strategies to design portfolios for your clients' financial goals
- Ongoing due diligence and monitoring by AssetMark

Fully Outsourced

- Custom HNW solutions tailored for your clients' unique needs, with tax-efficient transitions
- Solutions for all-size accounts
- Investment framework designed for a variety of market environments
- Ongoing due diligence and monitoring by AssetMark

Comprehensive Services to Strengthen Your Client Relationships

Market Commentary

Keep clients informed, under your brand

- Timely, professionally written market updates. Each piece delivers clear, client-ready insights on market and economic trends—reinforcing your role as a trusted advisor.
- Ready to share content, customized with your logo, and compliance reviewed by AssetMark.

Advanced Planning

Coming Soon

AssetMark's first-ever Advanced Planning program expands how we support trust departments and wealth firms. This in-house team of CFPs, CPAs, and JDs will provide expertise in financial planning, tax strategy, estate planning, and portfolio management—helping you deliver holistic wealth solutions that go beyond the portfolio.

Investment Consulting

Model portfolios designed for your practice in collaboration with you

Collaborative & Consultative: Work one-on-one with AssetMark's Investment Consulting Team to create models that fit your practice.

Unbiased Insights: Leverage information about AssetMark's due diligence and investment platform.

Advisor-Led Control: You make the final decisions; we simply guide the process.

Enhanced Governance: Clear documentation of your model design and rationale.

Client-Ready Story: Articulate the "why" behind your portfolios with confidence.

Working with AssetMark means having a team that understands the unique needs of trust organizations. From onboarding through conversions and continued support afterward, your dedicated service team delivers a white-glove experience — complete with direct phone access, responsive support, and a commitment to making every conversion seamless.

LEARN MORE

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Important Information

This is for informational purposes only, it is not a solicitation, and should not be considered investment, legal or tax advice. The information has been drawn from sources believed to be reliable, but its accuracy is not guaranteed and is subject to change.

Investing involves risk, including the possible loss of principal. Past performance does not guarantee future results. Asset allocation alone 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.

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