

Growth Consulting Program

Advisor FAQs

1. What is the Growth Consulting program?

Growth Consulting is an 18-month, hands-on engagement with a dedicated AssetMark Business Consultant, to be eligible, you must have been on the AssetMark platform for a minimum of one year. It helps you identify your top growth opportunities, create a tailored roadmap, and execute with accountability and measurable results. Think of it as having a coach in your corner—not just a plan, but real execution support.

2. How does the program work?

The program follows a clear four-step process:

1 Analyze

To determine whether the program is an appropriate fit, we will first need to develop a thorough understanding of your business and strategic goals.

- Complete the Growth Readiness Assessment to help AssetMark understand your current Marketing needs and goals.

2 Review and Consideration

Once you have submitted your assessment, we will begin the review process.

- Business consultant reviews assessment results to determine best fit based on readiness, capacity, and alignment within two weeks.

3 Registration and Engagement

You will be notified by your business consultant regarding acceptance.

- Your assessment serves as your application
- You will receive notification of your acceptance status within two weeks of submission.
- Upon acceptance, a \$1,000 consulting commitment fee is required.

4 Start your journey

Begin working with your business consultant towards your growth goals.

- Plan – Receive a tailored roadmap focused on custom growth tracks based on your practice and preferences (e.g., referral generation, lead generation, seminars, webinars, client feedback).
- Achieve – Working side-by-side with your consultant through regular virtual sessions, we'll not just have a plan but execute it and then monitor, adjust, and track your progress.

3. What is my investment?

- \$1,000 one-time commitment fee to participate in the 18-month engagement.
- Your time and commitment to implementing agreed-upon strategies.

4. What do I get as part of the program?



A personalized Growth Roadmap with clear targets



A dedicated business consultant committed to your success



Dashboard for tracking growth and measuring ROI.



Access to AssetMark's broader ecosystem:

- Marketing Advantage (lead generation & digital campaigns) – including programs and campaigns only available to participants of this program!
- Advisor benefits (access to strategic relationships with discounted fees or complimentary tools based on your status)
- AI and Technology efficiency tools

5. What will my business consultant work with me on to drive growth?

- Segmentation
- Service Model
- Fee Schedule
- Social Media Schedule
- Automated Client and Prospect Communication campaigns
- Target/Ideal Client Profile
- Value Proposition
- Website Review
- Client Feedback
- Paid Lead Gen
- Lead Generation & Management
- Seminar/Webinar Process

6. How much time will this take?

Months 1-2

Approximately 8-10 hours



Months 2-3

Approximately 6-8 hours



Months 3-18

4-6 hours per month

7. How Is this program different from other consulting services?

Unlike traditional diagnostic-only consulting programs, AssetMark Growth Consulting is designed to accelerate progress, helping you reach your goals faster through a focused, goal-driven approach with clear timelines and measurable outcomes.

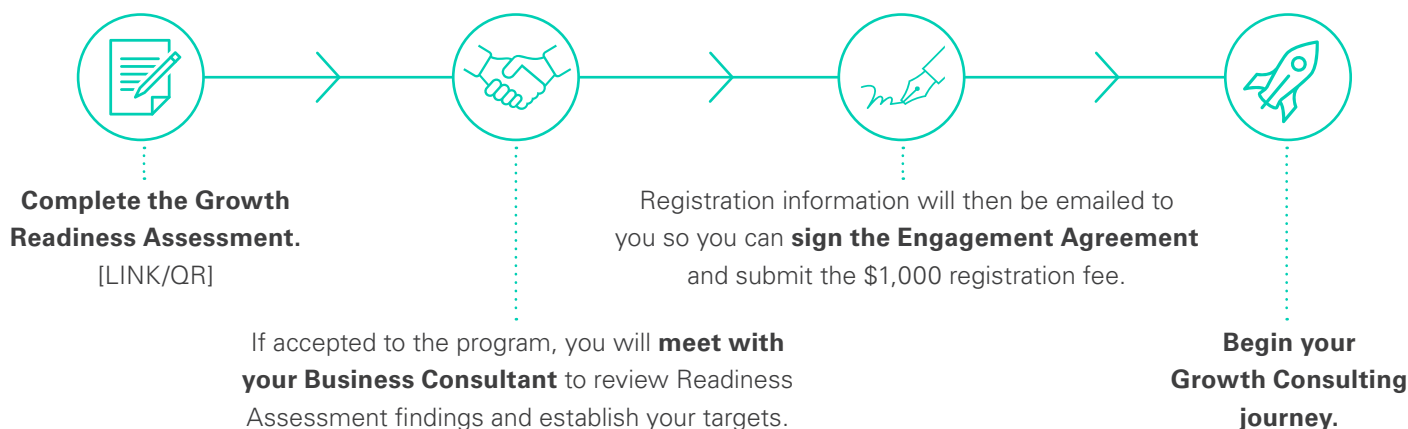
- **Low Commitment Fee:** Access expert consulting at a fraction of the cost for similar programs.
- **Execution Support:** Dedicated support over an 18-month period to ensure continued implementation and advancement.
- **Foundational Review:** **Comprehensive analysis of core practice management disciplines to ensure your firm is prepared for growth.**
- **Success Tracker:** **Personalized monthly tracker to capture metrics and track progress to goals.**
- **Exclusive Tools, Resources & Strategic Discounts:**
Access to exclusive advisor benefits, including complimentary business tools where eligible, preferred pricing on select third-party solutions, and strategic relationship resources designed to accelerate growth.
- **Corporate Discounts:** Leverage our preferred pricing on select third-party solutions through AssetMark's negotiated contracts.

8. Who is this program best suited for?

Advisors who:

- Have clear growth goals but struggle with execution.
- Want accountability to stay on track.
- Are prepared to commit time, resources, and focus to achieve measurable growth.
- Are looking to expand, acquire, or take their business to the next level.

9. How do I apply?



10. What if I don't get selected?

Not every advisor who completes the Growth Readiness Assessment will be invited to participate in the program. Selection is based on growth-readiness, capacity for implementation, and alignment with program goals. If you're not selected, you'll still receive valuable insights from your assessment, and your Business Consultant can help connect you to other AssetMark resources (such as Business Builder, Marketing Advantage, or First Year Success) to support your growth journey.

11. What happens if I don't meet my goals?

While success is highly likely with dedicated participation, you will still leave with:

- A personalized growth roadmap.
- New processes and tools.
- Measurable improvements to your practice infrastructure

12. What if I have other questions?

We're here to help. For any further inquiries, please contact us at: BCinfo@assetmark.com

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