

# Transform Your Vision Into Momentum



**What is your plan?**

## Strategic Guidance for Enterprise Leaders

When you're busy running your business, meeting with clients, and managing your team, staying on top of industry trends and strategically planning for growth can be hard to prioritize. The good news is you don't need to do it on your own.

AssetMark Enterprise Consulting meets you where you are—RIA, Hybrid, Broker-Dealer affiliated, or in transition— helping you break through growth barriers, capitalize on industry changes, and do what is best for your firm, advisors, and clients in every strategy and decision.

## AssetMark Enterprise Consulting Overview

Following the blueprint of your vision, AssetMark Enterprise Consulting helps you lead a durable, scalable business rooted in research, guided by trusted insight, and supported by tools that evolve as you grow.

For financial professional use only.

## What You Can Expect

- 1 Build a clear growth roadmap aligned to enterprise priorities
- 2 Strengthen leadership, mentorship, and accountability across teams
- 3 Improve operational execution and elevate the client experience
- 4 Establish an actionable strategy for recruiting, retention, and advisor succession



## AssetMark Enterprise Consultants help you:

- Define and deliver a compelling advisor-facing value proposition
- Provide customized advisor and train-the-trainer courses to improve practice management acumen and results
- Access and interpret the latest research and data on industry trends, challenges, and opportunities
- Track growth using meaningful metrics and firm-level reporting
- Gain additional perspective and insights on strategies and processes being developed by your leadership and team
- Design shared staffing and advisor support teams that increase scale and profitability

## ASSETMARK ENTERPRISE CONSULTING



### Increase Growth & Scale

Pursuing growth without increasing the scalability of your business ultimately drives value down. Learn ways to optimize three key areas of the business: costs, client experience, and culture to drive measurable value.



### Recruit & Retain Top Talent

Our Enterprise Consultants will work with you to establish an actionable recruiting strategy, metrics to measure impact, and the deliverables needed for success. We will also help create strategies to navigate practice transitions and ensure you retain top talent for your firm.



### Build & Strengthen Your Network

Leaders' Summit and other peer meetings bring enterprise leaders together to share ideas, discuss business strategies, and engage with key industry professionals.



### Become a More Effective Leader

AssetMark Enterprise Consultants help you build a roadmap for success and become a master of execution in any setting. With your consultant's guidance, you can become the leader your company needs.

Our enterprise consultants help firms grow stronger and more resilient—empowering leadership, enhancing collaboration, and creating enduring value for advisors, clients, and the communities they serve.

To get started, please contact us at  
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