Digital tools to fast-track your business

ASSETMARK®

Intuitive technology to transform your business and help you build and strengthen client relationships

At AssetMark, we're committed to making a difference in the lives of financial advisors and the clients you work with every day. Redefining the investment experience by providing the purpose-driven solutions you need to manage your clients' portfolios and run your business more efficiently.

The way you want to run it

That's why we designed our digital platform with you and your clients in mind, featuring a comprehensive suite of simple-to-use tools to help streamline the entire advisor-investor journey:

- **Prospect** and onboard new clients
- **Deliver** helpful advice and build custom portfolios
- **Monitor** performance and make occasional adjustments when necessary

Focus on what you do best—engaging with prospects and clients

That's the power of the AssetMark digital platform. Transforming the investment experience for the better. So, you and your clients can pursue your goals with confidence.

AssetMark's digital capabilities work harder so you don't have to

Evolving

AssetMark's technology team stays on top of innovation, so cutting-edge digital solutions are continually being evaluated and delivered to you and your clients' fingertips.

Integrated

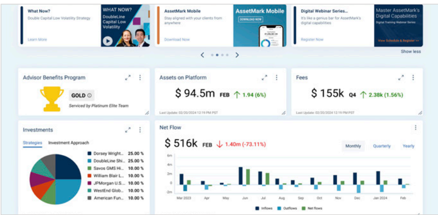
Our digital capabilities are seamlessly linked to one another, providing fast, stable, and easy-to-use solutions that deliver you and your clients value when needed.

Secure

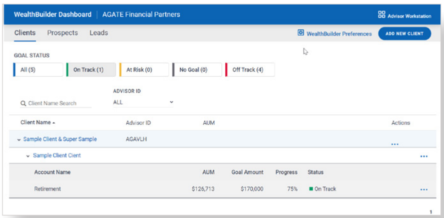
Digital security is our priority, so your and your clients' highly sensitive data remains private and protected from the ever-changing threat of cybercrime.

Digital solutions tailored to effectively manage every step of your advisor-investor journey

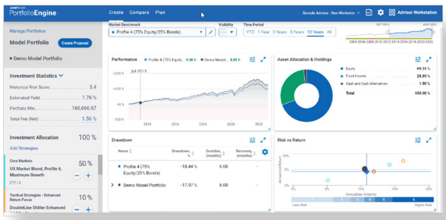
eWealthManager® puts the technology, data, and tools needed to engage clients, deliver financial guidance, and manage your business right at your fingertips. This includes powerful capabilities such as:



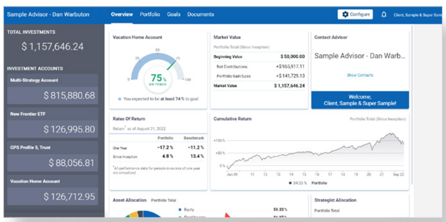
The Advisor Dashboard is the central hub of our digital ecosystem and provides real-time insights across your clients, accounts, and business. Featuring fully customizable, drag-and-drop tiles, this intuitive interface will enable you to tailor your dashboard to your unique preferences.



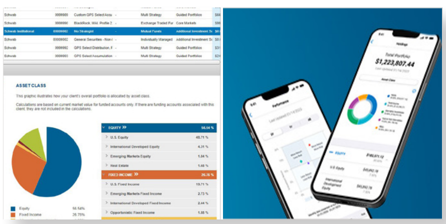
AssetMark WealthBuilder℠ is a simple but powerful tool that helps advisors guide their clients to get on track and stay on track with regards to their investments. This one tool can empower advisors to prospect new clients, help clients develop a goal-based plan, and efficiently service accounts.



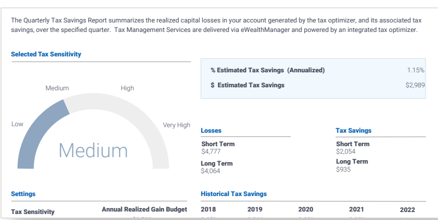
AssetMark PortfolioEngine® provides advanced portfolio analytics and data visualization experience where advisors can create, compare, and plan using multi-strategy portfolios and advanced analytics. Illustrations and Monte Carlo simulations complete the package to show how different portfolios might help an investor pursue their objectives.



Portfolio Review and On-Demand Reports are included as part of our robust suite of integrated tools to help advisors create professional, branded proposals, or conduct engaging virtual or in-person reviews. When it comes to connecting with your clients, we help you put your best foot forward.



Investor Portal and AssetMark Mobile provide secure and convenient access, via web and mobile app, to help your clients track investments anytime, anywhere. Additionally, important documents are a click away.



AssetMark's Tax Management Services (TMS) makes tax management a straightforward and seamless process for you and your clients. TMS delivers ongoing tax-smart management to your client's account with automated trade optimizations. Reduce the tax impact of managing your client's portfolio while remaining true to their long-term investing objectives.

Advisor-Investor Journey

	Prospecting	Onboarding	Advice Delivery	Portfolio Construction	Monitoring	Servicing
AssetMark WealthBuilder℠	●	●	●	●	●	●
AssetMark PortfolioEngine®			●	●		
Portfolio Review					●	●
Investor Portal and AssetMark Mobile					●	●
AssetMark Tax Management Services			●	●	●	

Strategic relationships that deliver additional value

Whether it's cutting-edge financial planning software firms like Voyant, MoneyGuide, and RightCapital, or technology firms that integrate with our platform to manage other parts of your business, AssetMark maintains strategic relationships with top industry providers to ensure you have access to the technology you need—often at preferred rates.

Support when you need it

What's more, AssetMark's digital solutions are backed by the stellar level of service and commitment that advisors have come to love when doing business with us. AssetMark even maintains a digital services team dedicated to helping advisors at all levels of their careers get the most out of our technological capabilities.

Call 800-664-5345 or visit AssetMark.com to get started.

AssetMark, Inc.
1655 Grant Street
10th Floor
Concord, CA 94520-2445
800-664-5345

Important Information

This is for informational purposes only, 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.

AssetMark, Inc. is an investment adviser registered with the U.S. Securities and Exchange Commission. RightCapital, MoneyGuide, and AssetMark are separate and unaffiliated companies. Each company is responsible for their own content and services. Voyant is an AssetMark company.

AssetMark, Inc. receives a portion of any subscription fees paid to FMG Suite by financial advisors working with AssetMark.

104627 | C22-19144 | 02/2024 | EXP 03/31/2026