

# Mark Your Calendars: Important EA-to-AssetMark 2026 Integration Dates

## Friday, March 20

- Last day to submit fee schedule change requests (Financial Advisor fees)

## Friday, March 27 (1-2PM ET)

- POWER HOUR webinar on AssetMark Tax Management Service (TMS)

## Wednesday, April 1 (1-2PM ET)

- POWER HOUR webinar on AssetMark Retirement Service (AMRS)

## Thursday, April 2

- Last day for:
  - Advisor de-linking requests
  - Account linking requests (for household billing)
  - Account name, address, or registration changes
  - New account creation and execution at Efficient Advisors

## Friday, April 17

- Last day to submit:
  - Model change requests
  - New or updated special trading instructions

## Thursday, April 23 (1–2 PM ET)

- April POWER HOUR Integration Webinar

## Friday, April 24

- Last day to initiate or update systematic withdrawal requests

## Friday, April 24 (8:00 PM ET) – Monday, April 27 (8:00 AM ET)

- Planned maintenance of the AssetMark Advisor Portal (no access during this time)

## Thursday, April 30

- Last day for:
  - One-time withdrawal requests
  - Acceptance of physical documents
  - Submitting service requests via the Efficient Advisors website

## Friday, May 1

- Final day to access accounts on the Efficient Advisors platform
- DocuSign will be shut down at custodians at market close; all envelopes will be voided

## Friday, May 1 (8:00 PM ET) – Monday, May 4 (8:00 AM ET)

- Planned maintenance of the AssetMark Advisor Portal (no access during this time)

## Monday, May 4

- Begin accessing your accounts via the AssetMark Advisor Portal

## Monday May 4 – Friday, May 8

- Client login invitations sent for access to AssetMark Investor Portal

## IMPORTANT INFORMATION

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