

# Fast Facts

## Reasons to Choose AssetMark

### AssetMark: Who We Are

For over 25 years, AssetMark has provided financial advisors with personalized solutions and guidance to meet their clients' evolving needs and successfully sustain and grow their businesses. Our flexible technology, business consulting services, and advisor-focused approach make it easy to deliver better outcomes and provide the most value for your clients.

# Reasons to Choose AssetMark

Did you know that advisors who leverage AssetMark report **better investment solutions, higher personal income, and stronger client relationships?**

Explore how using AssetMark to support back-, middle-, and front-office services can take your business to the next level.

## 1. Worth every penny.

Most advisors who work with AssetMark experience **AUM growth, lowered operating costs, higher business valuation, and increased personal income**, a value worth any associated costs.

“ *[Working with AssetMark] gives me more time to market and grow other areas of my business, including adding more AUM's.*  
—Insurance Broker-Dealer

Advisors who outsource with AssetMark report:



## 2. Enhance your practice.

“ *AssetMark has really become a partner in our business and the due diligence they provide is beyond what we expected. They make it easy to look very professional and on top of things to our clients.*  
—Independent Broker-Dealer



### 3. Control your time and priorities.

Leveraging AssetMark gives advisors flexible solutions and advanced capabilities that would otherwise require significant investments of time and money, ultimately **enhancing their productivity, profitability, and client satisfaction**. These capabilities include reducing time spent on administrative tasks and transitioning client assets. AssetMark's [First Year Success Program](#) especially simplifies the switch over to a new firm, and there are greater benefits overall from working with AssetMark as a strategic business solutions provider.

“ *Working with AssetMark as my primary TAMP is like having a partner, back office, business coach, CFA, and marketing department. This allows me to focus my time with my clients and to work with new clients. It has created a great amount of efficiency for me.* ”  
—Independent Broker-Dealer

90%



of AssetMark advisors report higher business valuation

97%



of AssetMark advisors report a better work/life balance

As a result of outsourcing with AssetMark, financial advisors save about

**11 hrs/week**

### 4. Customize solutions for personalized investment needs.

Receive greater access to diverse investment solutions designed to meet the evolving needs of investors across the wealth spectrum. AssetMark offers advisors comprehensive access to intuitive digital tools and personalized investment solutions that can help transform the client experience.

“ *I was able to grow assets under management more with freed up time and have appreciated the investment resources available. This has enabled me to grow without additional time taken at work.* ”  
—RIA

92%



of AssetMark advisors report that outsourcing with AssetMark has made them more successful

98%



of AssetMark advisors report delivering better investment solutions

**9 out of 10**

AssetMark advisors report greater oversight of portfolios

## 5. Outsourcing more with AssetMark leads to greater benefits.

Data from the 2024 Impact of Outsourcing study conducted in partnership with 8 Acre Perspective shows that AssetMark advisors report accessing a wider breadth of investment solutions and experiencing greater benefits when using our platform. The more that advisors leverage AssetMark as their strategic business solutions provider, the more financial, time, and personal benefits they gain cumulatively. These added benefits enable advisors to provide even more value to their clients.

“ [AssetMark...] has freed me and taken risk off my plate to allow me to focus more on planning and maintaining relationships.  
—Independent Broker-Dealer



\*Both AssetMark and Non-AssetMark Outsourcers

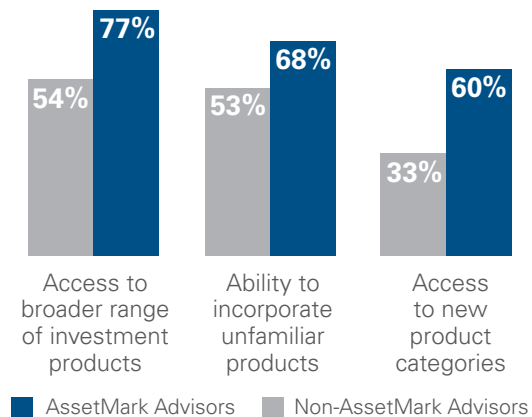
### AssetMark advisors save more time as a result of outsourcing than marketplace advisors, on average

Avg # of Hours / Week Saved Due to Outsourcing Investment Management



### Virtually all outsourcers affirm they deliver better investment solutions to clients, but AssetMark clients experience a broader range of benefits than marketplace advisors

Ways AssetMark Advisors are Delivering Enhanced Investment Solutions



Help deliver better outcomes for your clients.  
[Contact our team today.](#)

**AssetMark, Inc.**

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

**Important Information**

**About This Study**

The Impact of Outsourcing study was conducted in partnership with 8 Acre Perspective, an independent research firm, and represents the third installment of original research previously conducted by AssetMark in 2019 and 2021.

697 financial advisors participated in the study, completing an online survey between January and March 2024. Participants included 547 advisors who outsource investment management and 150 who do not. All participating advisors are owners/principals/partners at firms in the independent broker-dealer, insurance, and independent RIA channels.

All participants have the following characteristics:

- 7+ years tenure as a financial advisor
- Up to \$500 million in total assets under management
- At least 30% of total assets is fee-based business
- At least 50% of total assets under management is from individual retail investors
- Those who outsource investment management have at least 20% of their assets outsourced to a third party (broker-dealer, model provider, and/or TAMP)

**Quote Sources**

As part of an independent nationwide survey on outsourcing investment management, financial advisors provided their reflections on outsourcing. Views expressed are those of the financial advisor participants and do not necessarily reflect the views of AssetMark.

The statements reflect the views of financial advisors. The opinions are their own and relate to their experience. Advisors may have been compensated for participating in the survey.

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