

# AssetMark

For more than 20 years, AssetMark has provided independent advisors and their clients with unique investment and wealth management solutions.



## Access to Unique Investment Solutions

AssetMark provides a range of investment solutions that work toward specific objectives, whether it's saving for retirement, funding an education or planning for your legacy.

## Complete Wealth Management

Your advisor has access to specialized wealth management solutions through AssetMark to help you manage your cash and keep your portfolio intact. We offer:

- Specialty lending and banking solutions
- Trust solutions
- Donor-advised funds
- Retirement plans for small business owners



## Ongoing Due Diligence

All of the investment solutions offered at AssetMark undergo a rigorous due diligence process. Our experienced team has researched each solution and performs ongoing evaluation to help you understand the strengths, issues, and expected performance patterns of each strategy.



## Easier Access to Information

Our Smarter Account Setup<sup>SM</sup> streamlines and speeds your new account opening. Your advisor can share your quarterly performance reports and generate on-demand reports to keep you up-to-date.



## Technology, Service and Support

We help your advisor simplify their operations and focus on what's most important; you and your financial well-being.

# Your Dedicated Team of Financial Professionals



## FINANCIAL ADVISOR

Works with you to understand your situation, develops and implements a financial plan. Guides your portfolio along the way and recommends changes as needed.



## ASSETMARK

We provide investment services and unique solutions for independent advisors and their clients, including Complete Wealth Management, Trust Services and Retirement Services.



## BROKER DEALERS

Broker Dealers are in the business of buying and selling securities. These are typically large brokerage firms, and they act as a broker when they're transacting on their clients' behalf, and as a dealer when trading for their own account.

## INVESTMENT SOLUTION PROVIDERS

Research and identify opportunities in their area of expertise to fill in the framework designed by the strategist.



## PORTFOLIO STRATEGISTS

Establishes a framework for an investment portfolio. Determines an asset class mix that best represents their strategy and an investor's risk/return profile.



## CUSTODIANS

Holding your securities for safekeeping, they can hold either electronic or physical securities, and protect them from theft or loss.

For more information, contact your AssetMark consultant or call 844-540-0972 ▲

### AssetMark, Inc.

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