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## Business-Building Ways to Use

### PortfolioEngine®

PortfolioEngine helps you easily create portfolios, compare with outside accounts and help your clients plan for their future needs.

#### Advisors Successfully Use PortfolioEngine to:



##### **Win Assets by Going Above and Beyond Performance**

Use PortfolioEngine's robust information – including risk/return and drawdown – to demonstrate how you add value by assessing portfolio performance based on more than just investment returns.



##### **Help Clients Prepare and Plan for the Future**

Leverage PortfolioEngine to meet your clients' planning needs – for the short or long-term – by showing them how different investments and market conditions may impact their goals.



##### **Customize for Client Conversations**

PortfolioEngine makes it a breeze to move, change and resize information based on what you want to see, show and share. Review professional-looking reports that can help your clients make more-informed decisions.

See for yourself how PortfolioEngine - and AssetMark - can drive growth in your practice.

Request a demo from your AssetMark consultant or call 844-540-0972 ▲

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**Important Information**

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**Investing involves risk, including the possible loss of principal. Past performance does not guarantee future results.** No investment strategy, such as asset allocation, can guarantee a profit or protect against loss. It is not possible to invest directly in an index.

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