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## **AssetMark Launches Smarter Account Setup**

### ***New Functionality and Enhancements will Cut Down on Administrative Tasks and Increase Advisor Efficiency***

**CONCORD, CA** — July 12, 2017 — AssetMark, Inc., a leading provider of innovative investment and consulting solutions, today announced the launch of [Smarter Account Setup](#), which will significantly reduce the time it takes for advisors to setup and manage accounts. These updates will enable advisors to grow at scale and focus their efforts on serving clients in an increasingly competitive landscape.

“There is no question that advisors need to continue to find ways to improve efficiency and leverage technology to grow their businesses at scale,” said Carrie Hansen, EVP and Chief Operating Officer at AssetMark. “When we look at the data, we know that advisors spend an average of 41% of their time on administrative tasks and office management. Smarter Account Setup is a tool that can help carve out more time for clients.”

Smarter Account Setup includes new features such as, auto-fill options, on-screen alerts and automatic error checking that will reduce the time it takes advisors to create new account paperwork on the AssetMark platform. It also offers a simpler authorization process, exclusively for AssetMark Trust clients, allowing advisors to create new account paperwork for multiple account types with a single signature, as opposed to having clients sign multiple times. Additionally, the most relevant client and account information is consolidated on a single screen, limiting the time it takes for advisors to locate pertinent client information.

#### **About AssetMark, Inc.**

AssetMark, Inc. is a leading independent provider of innovative investment and consulting solutions serving financial advisors. The firm provides investment, relationship and practice management solutions that advisors use to help clients achieve their investment objectives and life goals. AssetMark, Inc., including its Savos and Aris divisions, has more than \$36 billion in assets on its platform and a history of innovation spanning over 20 years. For more information, visit [www.assetmark.com](http://www.assetmark.com) and follow [@AssetMark](https://twitter.com/AssetMark) on Twitter.

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