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AssetMark Adds New MarketDimensions Model Portfolios to Platform for Financial Advisors

AssetMark Models use funds from Dimensional Fund Advisors to Complement AssetMark's Curated Platform of Solutions

CONCORD, CA — August 7, 2018 — AssetMark, Inc., a leading provider of innovative investment and consulting solutions, announced today that 12 new AssetMark MarketDimensions portfolios, comprised of mutual funds from Dimensional Fund Advisors, are coming to the AssetMark platform. AssetMark will be the strategist using Dimensional Fund Advisors' mutual funds, which are based on the drivers of higher expected returns.

"MarketDimensions portfolios are a significant addition to the AssetMark platform," said Charles Goldman, President and CEO of AssetMark. "I have had the opportunity to work with the team at Dimensional Fund Advisors for more than a decade and have great respect for what they do and how they do it. Bringing these portfolios to our advisors, and their clients, will be a great way for advisors to help investors reach their goals," said Goldman.

The AssetMark MarketDimensions portfolios are aligned with six risk profiles to meet the diverse needs of investors across various life stages. "Dimensional Fund Advisors' robust investment process addresses a growing advisor need for low-cost, tax-efficient strategies that provide evidence-based investment solutions. Combined with AssetMark's asset allocation services, the model portfolios represent a compelling core market solution, helping clients achieve their long-term financial objectives," said David McNatt, SVP Product Management and Development for AssetMark.

With a 37-year history and \$586 billion in firm-wide assets under management, Dimensional Fund Advisors translates academic research into practical investing solutions that are widely recognized in the financial services industry. Their approach is grounded in economic theory and insights from financial science which inform the eponymous "dimensions" of expected returns around which their portfolios are structured. For equities, these are: Market, Company Size, Relative Price¹, and Profitability², and for fixed income they are Term, and Credit. To meet the rigorous analysis that guides their investment philosophy, the dimensions must be sensible, persistent over time, pervasive across markets, and cost-effective to capture.

About AssetMark, Inc.

AssetMark, Inc., an investment adviser registered with the Securities and Exchange Commission, is a leading independent provider of innovative investment and consulting solutions serving financial

advisors. The firm provides investment, relationship and practice management solutions designed to make a difference in the lives of advisors and their clients. AssetMark, Inc., including its Savos and Aris divisions, has more than \$44 billion in assets on its platform and a history of innovation spanning over 20 years. AssetMark and Dimensional are separate and unaffiliated companies.

For more information, visit assetmark.com or follow AssetMark on [Twitter](#) or [LinkedIn](#).

This release is for informational purposes only and is not a solicitation for investment. Investing involves risk, including the possible loss of principal. Past performance does not guarantee future results.

Investments are not FDIC-insured, nor are they deposits of or guaranteed by a bank or any other entity, so they may lose value.

Investors should carefully consider investment objectives, risks, charges and expenses. This and other important information is contained in the fund prospectuses, which can be obtained from a financial professional, and should be read carefully before investing.

Past results are not predictive of results in future periods.

1. Relative price as measured by the price-to-book ratio; value stocks are those with lower price-to-book ratios.
2. Profitability is a measure of current profitability, based on information from individual companies' income statements.

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