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AssetMark Launches Exclusive Global Flexible Strategy from J.P. Morgan

New solution combines active mutual funds with strategic beta ETFs for core market exposure and managed risk at a lower all-in cost

CONCORD, CA — January 30, 2018 — AssetMark, Inc., a leading provider of innovative investment and consulting solutions, announced the launch of the J.P. Morgan Global Flexible strategy, the only core market global solution on AssetMark’s platform to offer broad-based market exposure through a combined active and passive approach.

The new strategy is currently only available on AssetMark’s platform. It features a blend of J.P. Morgan institutional-share class mutual funds and ETFs that offers advisors greater flexibility to capitalize on immediate opportunities and adjust portfolio allocations, while managing risk more efficiently at a lower all-in cost.

“This solution really is the best of both worlds. The balance between active and passive strategies sets the stage for potentially better outcomes for investors by giving advisors a solution with broader flexibility to express conviction views,” said Zoë Brunson, SVP, Investment Strategies at AssetMark. “This solution also provides the potential for higher risk-adjusted returns.”

The J.P. Morgan Global Flexible strategy brings actively-managed mutual funds together with “strategic beta” ETFs. “Strategic beta” ETFs rely on a systematic rules-based investment process that aims to capture much of the market’s upside with reduced downside risk. Advisors can choose from six Global Flexible Model Portfolios within the solution, each with a unique growth objective ranging from conservative to aggressive. All portfolios include the option to adjust the risk and return potential based on the current investing environment, as well as clients’ specific financial objectives and life goals.

“Today’s economic environment gives advisors considerable runway to drive returns for their clients; at the same time, it’s vital that they are also able to pivot to manage risk,” said Natalie Wolfsen, EVP and Chief Solutions Officer at AssetMark. “We are pleased to present advisors with a strategy that allows them to fully exercise their market expertise on behalf of investors while remaining adaptable.”

Important Information

*This information is not a solicitation, and should not be considered investment advice. **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 in periods of declining values.*

Investments in mutual funds and exchange traded funds that hold equities, bonds, and other securities can decline significantly in response to adverse market conditions, company-specific events, changes in exchange rates, and domestic, international, economic, and political developments.

For more complete information about the various investment solutions available, including the investment objectives, risks and fees, please refer to the Disclosure Brochure and applicable Fund Prospectus. Please read them carefully before investing. For a copy, please contact an AssetMark Consultant.

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 \$42 billion in assets on its platform and a history of innovation spanning over 20 years. For more information, visit www.assetmark.com and follow [@AssetMark](https://twitter.com/AssetMark) on Twitter.

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