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AssetMark Launches Enhanced PortfolioEngine Tool

Expanded suite of features is designed to help financial advisors build fine-tuned client portfolios and facilitate intuitive and meaningful advisor-investor conversations

CONCORD, CA — June 19, 2018 — AssetMark, Inc., a leading provider of innovative investment and consulting solutions, today announced updates to AssetMark PortfolioEngine®, a newly enhanced and redesigned modeling tool that enables financial advisors to dynamically create, compare, and plan portfolios that are in-tune with clients’ financial goals. The expanded features of PortfolioEngine also help advisors leverage intuitive visual modeling analytics to educate and empower investors to make well-informed investment decisions.

PortfolioEngine now provides a variety of new, sophisticated features that build upon the original foundation of the tool, including:

- **Customized views:** Advisors can easily move, change, and compare portfolio information to create a dashboard experience that encourages constructive client conversations and educates investors on the ways in which recommended investment selections are designed to help them achieve their financial objectives.
- **Added analytics:** New, dynamic analytics features allow advisors to make more informed portfolio decisions and visually convey to clients how different allocations, market conditions, and risk expectations could impact recommended investment outcomes.
- **Expanded goal planning:** Advisors can robustly model clients’ unique savings or retirement goals to clearly illustrate how various investments, market scenarios, contributions, and distributions may impact their long-term goals.

According to [Accenture](#), 77 percent of advisors have noticed an increase in investors’ desire for digital tools, with 75 percent of advisors expecting this trend to grow stronger through 2020. Moreover, research suggests that explaining portfolio performance using visuals is one of the best ways to facilitate the meaningful conversations that help investors understand the reasoning behind investment allocations and engage with an advisor’s targeted financial approach.

“Through this critical tool, advisors gain the flexibility to choose the specific analytics and modeling features that will truly resonate with their clients’ unique financial goals and preferences,” said Matt Matrisian, SVP of Strategic Initiatives at AssetMark. “With PortfolioEngine at their fingertips, advisors will be even better positioned to attract and retain clients through enhanced portfolio construction capabilities and the ability to engage and communicate with investors in a visually intuitive way.”

PortfolioEngine is a continuation of AssetMark's ongoing commitment to providing financial advisors the technology and tools needed to create high-quality portfolios that target their clients' financial objectives.

"This redesigned tool integrates new and existing features to help advisors select the strategies ideally suited for their clients' individual needs," said Natalie Wolfsen, EVP, Chief Solutions Officer at AssetMark. "PortfolioEngine is a critical component of AssetMark's overall Investing Evolved framework, which aims to make a difference in the lives of advisors and their clients through strategic and targeted portfolio-building solutions."

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 that advisors use to help clients achieve their investment objectives and life goals. 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. For more information, visit www.assetmark.com or follow AssetMark on [Twitter](#) or [LinkedIn](#).

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