



MEDIA CONTACT:
Lexy Siegel, Group Gordon
LSiegel@GroupGordon.Com
(212) 784 5727

AssetMark Wins 2019 WealthManagement.com Industry Awards for Turnkey Asset Management Platform Category

CONCORD, CA – September 27, 2019 – AssetMark, Inc., a leading provider of innovative investment and technology solutions, was named the winning firm in the Turnkey Asset Management Platform (TAMPs) category of the 2019 WealthManagement.com Industry Awards. The awards celebrate the companies, individuals and organizations that demonstrate outstanding achievement in support of financial advisor success.

The TAMPs award category recognizes new initiatives and programs as well as enhancements to existing platforms that improve advisors’ understanding, usage and portfolio management via a TAMP model. AssetMark won the award for its [Guided Income Solutions](#)SM (GIS), turnkey, professionally-managed portfolios designed to deliver stable cash flow to advisors’ clients planning for multiple milestones, including retirement, college and caring for loved ones. Using a “bucketed” investing framework, the solutions provide advisors with a straightforward approach to tailoring client savings and income replacement to meet short-, intermediate-, and long-term objectives.

By providing a solution that automatically adjusts the portfolio, GIS enables advisors to focus on holistic financial planning—spending more time with clients to help them reach their goals. GIS positions advisors to understand and tackle the complexities of retirement income planning in greater detail, while efficiently tracking clients’ progress toward their goals.

“AssetMark is committed to developing solutions that serve the evolving needs of financial advisors and their clients,” said Natalie Wolfsen, Chief Solutions Officer of AssetMark. “We are honored to be recognized by WealthManagement.com for Guided Income Solutions, which meets a growing need for solutions that can flex to deliver a stable income to investors as they move into retirement.”

This year, there was a record number of 650 submitted nominations from 262 companies. Winners were selected on a combination of quantitative measures of their initiatives, as well as qualitative measures including innovation, creativity and new delivery methods. The winners were announced at WealthManagement.com’s fifth annual Industry Awards at Ziegfeld Ballroom in New York City on Thursday, September 12th. You can find the full list of 2019 Winners here:

<https://events.wealthmanagement.com/2019-winners/>

About AssetMark Financial Holdings, Inc.

AssetMark Financial Holdings, Inc. (NYSE: AMK) is a leading provider of extensive wealth management and technology solutions that power independent financial advisers and their clients. AssetMark, Inc., an investment adviser registered with the Securities and Exchange Commission, operates a platform that

comprises fully integrated technology, personalized and scalable service and curated investment solutions designed to make a difference in the lives of advisers and their clients. AssetMark has \$56.1 billion in platform assets as of June 30, 2019 and a history of innovation spanning more than 20 years.

###

SOURCE: AssetMark, Inc.