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AssetMark Unveils Updates to American Funds and Parametric Investment Solutions

***Latest innovations are designed to help advisors optimize portfolios
and client outcomes in any market environment***

CONCORD, CA — March 27, 2018 — AssetMark, Inc., a leading provider of innovative investment and consulting solutions, today announced a number of updates to multiple investment solutions on its platform, including American Funds Model Portfolios and Parametric Custom Portfolios. Together, the updated solutions target a range of investor needs, including cost-sensitivity, enhanced diversification, loss-limiting, and return-enhancing strategies for varying market conditions.

“These updates further strengthen and expand existing solutions to help advisors deliver optimal results for their clients in any market environment,” said Jerry Chafkin, EVP, Chief Investment Officer at AssetMark. “This reinforces our commitment to provide advisors with the tools needed to help investors achieve their financial goals.”

Specifically, expanded solutions include:

American Funds Model Portfolios

In collaboration with Capital Group, American Funds Model Portfolios is now available with a new Risk Profile 5 option, a low-turnover, objective-driven, broad market strategy that allows investor participation in the growth of global economies. This addition rounds off the suite of actively managed solutions suited to serve as the foundation of clients’ portfolios. Each model portfolio is constructed by the American Funds Portfolio Oversight Committee, which follows a bottom-up process that includes rigorous analysis of the underlying mix of funds driving the strategy.

Parametric Custom Portfolios

The Parametric Custom Portfolios All Equity strategy is now available with the same index-based approach, active tax management, and socially responsible options at a lower cost. Also included in the Parametric update are sample target allocations to make it even easier for advisors to get started with these custom strategies. Advisors can personalize each portfolio based on clients’ unique needs and risk profiles while seeking market returns. Parametric Custom Portfolios continue to provide active and passive in one solution through the combined expertise of Parametric and Eaton Vance.

“Advisors are reporting increased uncertainty among their clients about the future of the markets overall and how their investments will perform,” said Natalie Wolfson, EVP, Chief Solutions Officer at AssetMark.

“Collectively, these updates can help reinforce advisors’ abilities to prepare for changes to our market climate with a disciplined approach.”

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.

This release is for informational purposes only, and is not a solicitation or offering for any investment, and should not be considered as investment or tax advice.

AssetMark and third-party strategists are separate and unaffiliated companies. AssetMark, Inc., including its Savos and Aris divisions, has more than \$43 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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