

ASSETMARK

WealthBuilderSM



Streamline and scale your practice with WealthBuilder, AssetMark's online investment and planning experience. Designed to offer your clients personalized advice combined with online convenience, WealthBuilder gives you the flexibility to meet clients where they currently are in life...and then take them where they want to go.

WealthBuilder provides you with:



- Segmented solutions for clients with low complexity or fee sensitivity
- Straightforward planning to help clients determine the right portfolio for their goals
- Specialized, systematic monitoring to help WealthBuilder Portfolios stay on track

WealthBuilder provides your clients with:



- Customized plans designed to meet their specific goals
- Comprehensive, lower-cost portfolios constructed to their risk tolerance
- Confidence resulting from a consultative process with you as their financial advisor

WealthBuilder Portfolios

WealthBuilder Portfolios combine core asset class ETFs with actively managed mutual funds to provide diversification at a lower cost.

Minimum Investment: \$10,000

Risk Profiles: 1-6

Fees: Starting at 45 basis points

Now is the time to build wealth the WealthBuilder way. For a demo, contact your AssetMark Consultant or call 844.540.0972 ▲

AssetMark, Inc.

1655 Grant Street
10th Floor
Concord, CA 94520-2445
800-664-5345
www.assetmark.com

Important Information

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Investing involves risk, including the possible loss of principal. Past performance does not guarantee future results. Asset allocation alone cannot eliminate the risk of fluctuating prices and uncertain returns. There is no guarantee that a diversified portfolio will outperform a non-diversified portfolio. No investment strategy, such as asset allocation, can guarantee a profit or protect against loss. It is not possible to invest directly in an index.

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.

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