AssetMark

For more than 20 years, AssetMark has provided independent advisors and their clients with unique investment and wealth management solutions.

Access to Unique Investment Solutions

AssetMark provides a range of investment solutions that work toward specific objectives, whether it's saving for retirement, funding an education or planning for your legacy.

Complete Wealth Management

Your advisor has access to specialized wealth management solutions through AssetMark to help you manage your cash and keep your portfolio intact, including:

- Specialty lending and banking solutions
- Trust solutions
- Donor-advised funds
- Retirement plans for small business owners

Ongoing Due Diligence

All of the investment solutions offered at AssetMark undergo a rigorous due diligence process. AssetMark's experienced team researches solutions and performs ongoing evaluation to help you understand the strengths, issues, and expected performance patterns of each strategy.

Easier Access to Information

AssetMark's Smarter Account Setup℠ streamlines and speeds your new account opening. Your advisor can share your quarterly performance reports and generate on-demand reports to keep you up-to-date.

Technology, Service and Support

AssetMark helps your advisor simplify their operations and focus on what's most important; you and your financial well-being.

Your Dedicated Team of Financial Professionals

FINANCIAL ADVISOR

Works with you to understand your situation, develops and implements a financial plan. Guides your portfolio along the way and recommends changes as needed.

PORTFOLIO STRATEGISTS

Establish a framework for an investment portfolio. Determines an asset class mix that best represents their strategy and an investor's risk/return profile.

ASSETMARK

Provides investment services and unique solutions for independent advisors and their clients, including Complete Wealth Management, Trust Services and Retirement Services.

BROKER DEALERS

Broker Dealers are in the business of buying and selling securities. These are typically large brokerage firms, and they act as a broker when they're transacting on their clients' behalf, and as a dealer when trading for their own account.

INVESTMENT SOLUTION PROVIDERS

Research and identify opportunities in their area of expertise to fill in the framework designed by the strategist.

CUSTODIANS

Hold your securities for safekeeping, and protect them from theft or loss.

For more information, contact your financial advisor

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Important Information

This is for informational purposes only, is not a solicitation, and should not be considered investment, legal or tax advice. The information has been drawn from sources believed to be reliable, but its accuracy is not guaranteed, and is subject to change.

Investing involves risk, including the possible loss of principal. Past performance does not guarantee future results.

AssetMark, Inc. is an investment adviser registered with the U.S. Securities and Exchange Commission.

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