Working with AssetMark Has Never Been Easier

It starts with our personalized **First-Year Success Program** that unlocks the power of our platform to help you supercharge your biggest goals for your business. You'll be blown away by what you can accomplish in your first year with us.

Enabled by three impactful, growth-enabling services designed to make serving your clients more effortless than ever—and these are just the beginning!

For financial advisor use with advisory clients.

New Investment **Model Building** Service

Direct access to the AssetMark Investment Consulting team who will create custom model portfolios.

Models aligned directly to your preferences and your clients' goals.

Structured to enhance your efficiency and scale.

Ensuring you have confidence and control.

New Powerful **Tax Management** Services

Unlock new tax efficiencies and potentially boost returns with our personalized and comprehensive tax solution.

Personalize and differentiate your service to new and existing clients.

Deliver demonstrated value with tax impact reports that depict the value created.

New **Expanded Transition Support** Based on Your Needs

Let us take the pain out of forms creation when changing platforms.

We'll minimize disruption and help accelerate your growth and your Advisor Benefits from AssetMark, Inc.

We can plan and execute your big move, repositioning your practice for scale, growth, and time back for you!

Think big and achieve. Get started today!

AssetMark, Inc.

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Important Information

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

The Tax Management Services (TMS) is designed to improve the after-tax return for the clients account, consistent with the risk/return profile of the investment models based on the selected tax sensitivity. TMS may cause the account to deviate from the investment models and can affect the risk profile and performance of the account. A higher tax sensitivity account setting can have a higher deviation from the investment models than a lower tax sensitivity. Adding TMS customizations to the account can impact the account tax and investment results. Tax analysis proposal reports may vary over time. Actual tax management results are subject to change based on investment holdings, market conditions, timing, and other factors. Securities may be partially traded or not traded due to market movements and illiquidity, rebalancing, client activity, and other factors. The account may be invested in non-model securities intended to approximate the target investment models. AssetMark, at its discretion, will determine when to take tax management actions based on any client restrictions or other instructions, such as client withdrawals. The timing of trading in TMS accounts may differ from non-TMS accounts. If an investment strategy is closed, the closed strategy may no longer be TMS-eligible; and AssetMark may provide an alternative TMS-eligible strategy.

The tax savings report is not a replacement for other tax reports for tax filing purposes. Investors seeking more information should contact their financial advisor.

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