

Reach New Heights



Elevate Your Business

From how you run your business to how you serve your clients, your needs evolve — and you need an elevated platform experience that evolves with you.

AssetMark's Advisor Benefits Program supports your needs and drives you to the next level of growth in your business.



Program Highlights



Reach qualifying status with total assets on AssetMark platform



Elevate your business with five unique status tiers



Unlock unique benefits by reaching status and completing activities



Qualify for status throughout the year with quarterly upgrades and annual reassessment

Reach the Next Level

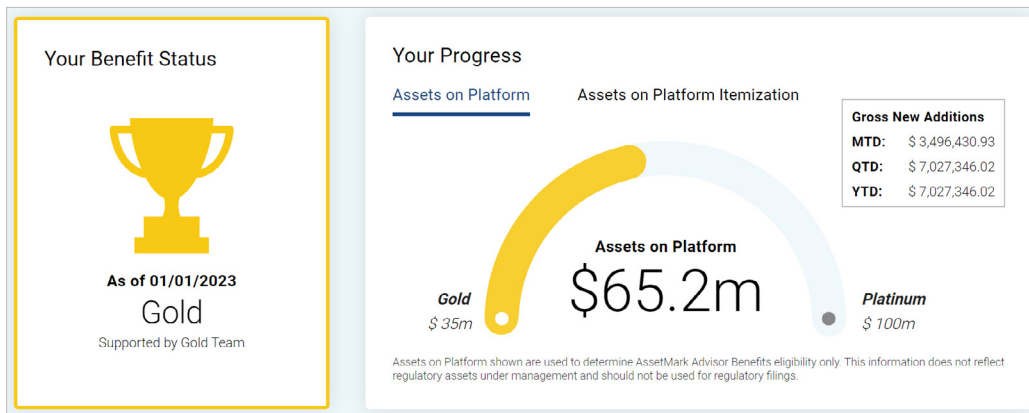
To qualify for the program, you must reach the minimum status level based on total assets on platform. Total assets on platform include any assets held on AssetMark’s platform and other eligible assets, including assets held with AssetMark Retirement Services®.

Once you reach status, you’re eligible to receive core benefits—and with status, become eligible to receive additional benefits when you complete required activities prior to the program year.



Status is Within Reach

Track your progress, view benefits, complete activities, and more, easily through our comprehensive online dashboard, available exclusively to advisors working with AssetMark.



*In response to the current market environment, AssetMark has reduced the total asset requirements for most tiers in 2023 to help you access a higher level of benefits and stay focused on supporting your clients.

Benefits that Go the Distance

From Premier to Platinum Elite, you can enjoy various benefits tailored to supporting your business and your growth with AssetMark. You can access two types of benefits:

Status-based benefits are unlocked when you reach status and include differentiated service support, invitations to exclusive events, and Business Consulting services.

Activity-based benefits are unlocked when you reach status and complete certain growth activities, such as assessments, business-building plans, and events and workshops all focused on driving growth for your business.

Status-Based Benefits

Differentiated Service Support

We know that service and operations is the backbone of every advisor's practice and AssetMark prides itself in delivering customer-centric support that's designed to enable your business growth and give you more time back to serve your clients.

Business Consulting Services

We work with you to identify opportunities and deliver a tailored solution that meets the unique needs of your business. Receive valuable insights into staffing, technology, operational efficiency, succession planning, and developing your client base through a range of formats from in-person events, to online tools and resources, and one-on-one consulting.

Exclusive Events

Gain access to unique events that foster education and deep networking to best support your growth.

◆ Premier Advisor Meetings

Advisors with Premier and above status are invited to attend one-day regional meetings to discuss current trends and best practices.

◆ Gold Forum

Gold, Platinum, and Platinum Elite advisors are invited to this multi-day experience featuring dynamic keynote speakers, interactive breakout sessions, and networking opportunities.

◆ Platinum Summit

Platinum and Platinum Elite advisors are invited to this intimate event, offering access to AssetMark executives and industry leaders discussing relevant topics and trends.

◆ Platinum Elite Experience

Join this special experience offered only to Platinum Elite status advisors attending the Platinum Summit.



Activity-Based Benefits

Earn two activity credits in the prior year, and you'll have access to various complimentary tools and services, including financial planning tools, marketing solutions, client communication tools, and more, during the program year.



“The breadth of benefits available has been very beneficial to improving my practice.”

—Phil M., financial advisor
working with AssetMark



Ready to reach new heights?

Contact your AssetMark Consultant or call us
at 800-664-5345 to learn more.

AssetMark, Inc.

1655 Grant Street
10th Floor
Concord, CA 94520-2445
800-664-5345

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. Voyant is an AssetMark company. References to third-party service providers are for informational purposes only, and should not be considered an endorsement or recommendation of AssetMark. AssetMark and third-party service providers are separate and unaffiliated companies, and each party is responsible for their own content and services.

AssetMark and its affiliates may engage with providers for services. AssetMark, Inc. receives a portion of any subscription fees paid to FMG Suite by financial advisors working with AssetMark.

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

©2023 AssetMark, Inc. All rights reserved.
105219 | M23-101749 | 03/2023 | EXP 03/31/2025