

AdvisorLinkSM : A Private Mergers & Acquisitions Marketplace

Powered by FindBob



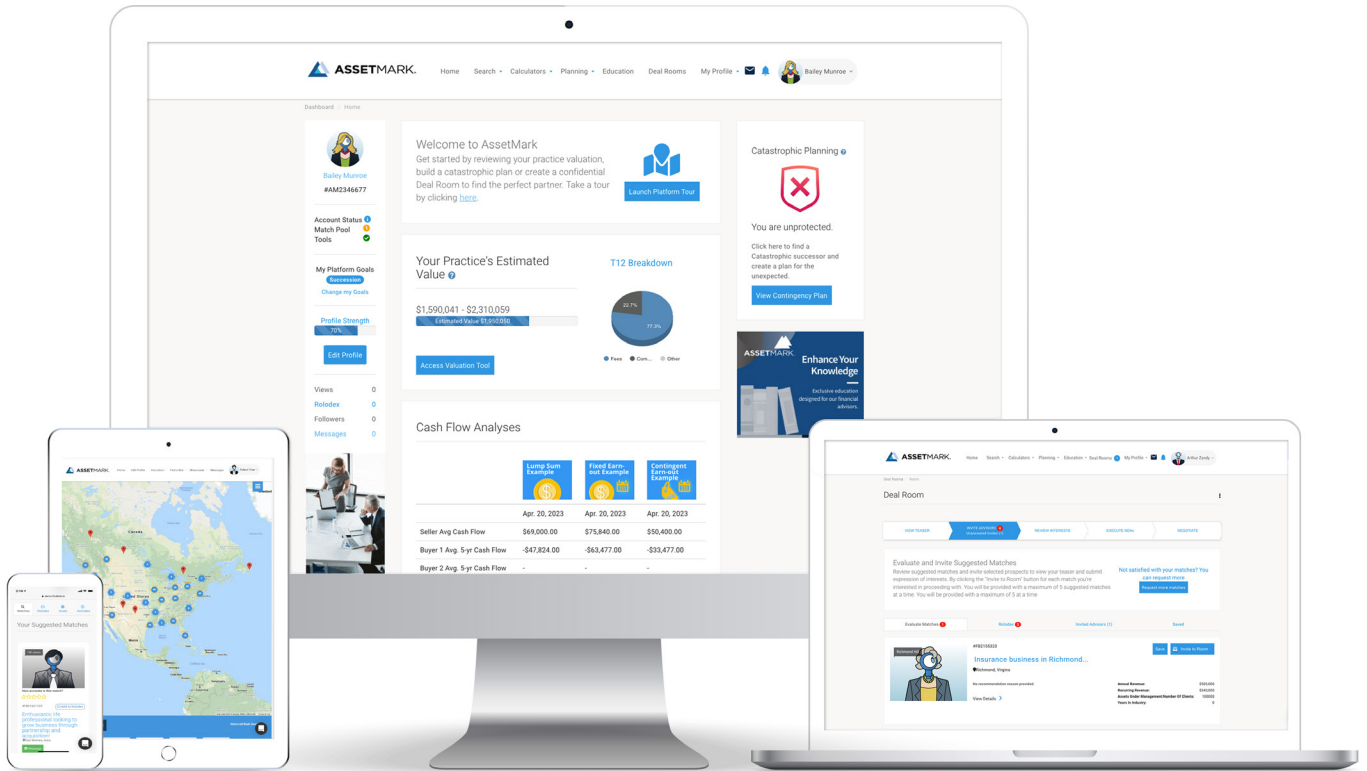
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findbob

Find out how AdvisorLink, powered by FindBob, can help you look for opportunities to buy, sell, merge, partner, or find a succession or continuity partner to maximize the value of your most precious asset: your book of business.

How can AdvisorLink help?

This tool connects you with other AssetMark advisors to explore prospects and prepare your continuity or succession plan in an exclusive community on your terms.



AdvisorLink offers:

Rich Profiles

Create complete, detailed, and 100% anonymous profiles on a private AssetMark network.

Catastrophe Planning

Protect your practice and loved ones by digitally completing a Catastrophic Plan on the platform.

Intelligent Matchmaking

Accelerate meaningful connections with valid growth opportunities on FindBob's proprietary ranking system that provides matches based on business, interpersonal, and psychological traits.

Targeted Searches

Specify criteria via a traditional list or a powerful map-based search to quickly narrow opportunities of interest based on personal or professional requirements.

Deal Rooms

Go to market safely and confidentially with tools purposefully designed to help sellers establish their succession and selling goals.

Secure Connections

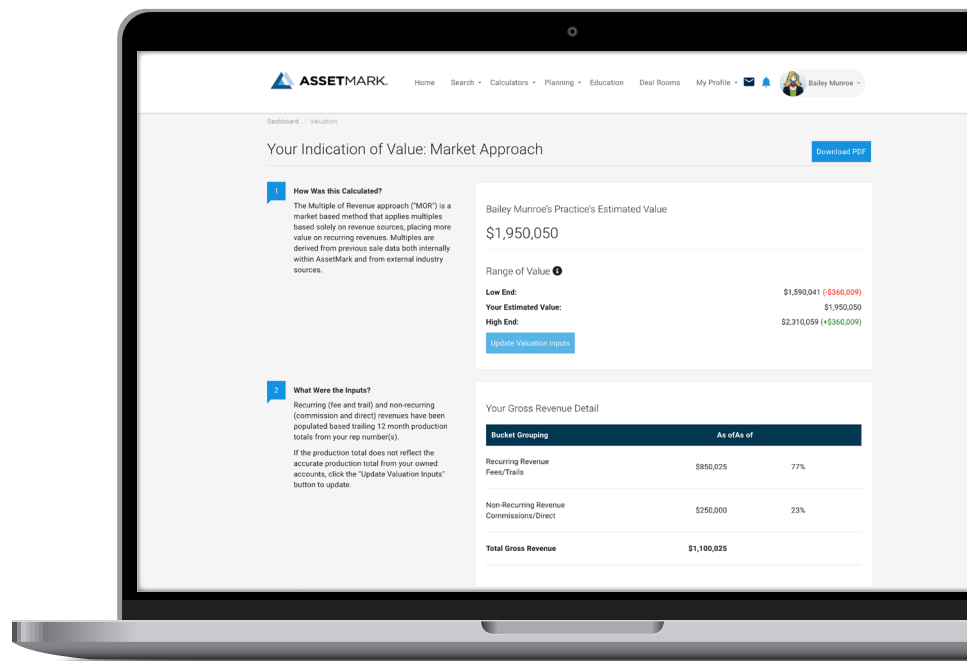
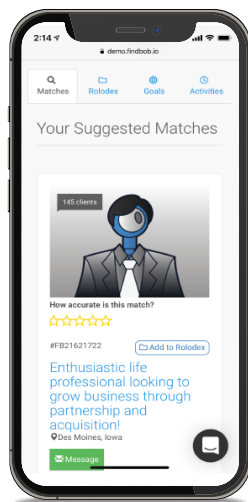
Communicate with one another using an internal private messaging platform.

Diligence Tools

Keep track of all the profiles you're interested in and store research notes within your marketplace rolodex.

Valuations

Access the FindBob valuation tool to provide an indication of value and educate yourself on multiple valuation approaches, like the income and market-based approach, to inform you of the underlying factors that impact growth. You'll also have access to AssetMark's valuation tool and should contact your AssetMark consultant to learn more.



FAQ's

What is FindBob?

The only machine learning platform focused on succession development and talent management within the financial services industry. Their proprietary algorithm matches users based on their goals for growth and their usage of the platform.

Why is AdvisorLink beneficial for AssetMark advisors?

Within the next ten years, 37% of financial advisors who collectively control \$10.4 trillion, or 40% of industry assets, expect to retire. Among advisors retiring in the next decade, 25% are unsure of their succession plan.¹ AdvisorLink is a private mergers and acquisitions marketplace that connects you with other AssetMark advisors to explore opportunities to buy, sell, merge, partner, or find a succession or continuity partner in an exclusive community.

Business acquisitions have been a growing trend in the financial services industry—and we do not see that slowing down. It's an area that we see significant interest from financial advisors and a need for a solution. Providing an exclusive community to explore succession and other business opportunities is part of AssetMark's philosophy to meet advisors where they are going.

Who can access AdvisorLink?

AdvisorLink is an activity-based benefit within the Advisor Benefits Program. This benefit is available to qualified advisors who are Premier and above and is subject to broker-dealer approval.

How do I access AdvisorLink?

Qualified advisors can request access to AdvisorLink through their benefits dashboard on eWealthManager® under the Advisor Workstation.

¹Source: Cerulli Advisor Metrics 2022

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