

ADVISOR BENEFITS PROGRAM

Benefits Overview

From Premier to Platinum Elite, you can enjoy a variety of benefits tailored to your current status and your status as you grow with AssetMark. To qualify, you must reach the minimum level of status based on **total assets on the platform**. Once you reach status, you are eligible to receive certain benefits based on your current **level of status**. **Please note that in 2025, the Benefits Status will revert back to the original Status minimums noted below.** You can receive additional benefits when you complete the required activities within the program year. All benefits are subject to change and broker-dealer approval.

	Premier \$5m+ Assets on Platform	Premier Elite \$20m+ \$25m+ Assets on Platform*	Gold \$35m+ \$50m+ Assets on Platform*	Platinum \$100m+ \$125m+ Assets on Platform*	Platinum Elite \$250m+ Assets on Platform
Status-Based Benefits					
Business Consulting					
Business Consulting Services	•	•	•	•	•
Events					
Premier Advisor Meeting	•	•	•	•	•
Gold Forum			(1 invite)	(2 invites**)	(3 invites**)
Platinum Summit				(1 invite)	(2 invites**)
Platinum Elite Experience					•
Service & Operations					
Advisor Services Team	•				
Premier Elite Service		•			
Gold Service			•		
Platinum Service				•	•
Activity-Based Benefits					
Client Communication					
Absolute Engagement			50% Discount	•	•
BombBomb		•	•	•	•
Redtail***			•	•	•
Wealthbox			•	•	•
Zoom	•	•	•	•	•

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Activity-Based Benefits (select from one of the following)					
Financial Planning					
MoneyGuidePro			•	•	•
MoneyGuidePro + Yodlee				•	•
MoneyGuidePro + Yodlee + MyBlocks				•	•
MoneyGuideElite				•	•
MoneyGuideElite + Yodlee				•	•
MoneyGuideElite + Yodlee + MyBlocks					•
RightCapital Basic			•	•	•
RightCapital Premium				•	•
RightCapital Platinum					•
Voyant			•	•	•
Growth and Marketing					
Marketing Advantage Essential	•	•	•	•	•
Marketing Advantage Essential +		•	•	•	•
Marketing Advantage Essential X			•	•	•
Marketing Advantage Premium				•	•
Marketing Advantage Do It For Me					•
Business Management					
AdvisorLink SM	•	•	•	•	•
Matching Program					
Wealthfeed, Golden Hello, Horsemouth, LeadingResponse			Up to \$2,500 match per year	Up to \$5,000 match per year	Up to \$10,000 match per year

* 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. In 2025, we will be reverting to the original benefit tiers listed above.

** Additional invites to AssetMark events are intended for licensed financial advisors utilizing the AssetMark platform.

*** Redtail has changed its pricing structure from up to 15 users on one database for one flat rate to a per-user cost for all its new packages. Beginning 9/1/24, AssetMark will pay for one license per qualifying advisor under Redtail's new Growth Plan via reimbursement. Users with existing complimentary licenses granted prior to 9/1 /24 will be switched to Redtail's Growth Plan and its features on 9/1/24 but will not be required to pay for additional users until the current license expires. Upon expiration, grandfathered users will have the option to switch to reimbursement for one license and pay for any additional licenses or cancel their subscription.

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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.

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