

Leadership Advantage

FAQs for Enterprise Owners



What You Can Expect from AssetMark Leadership Advantage

What is the Leadership Advantage Program?

It is designed for enterprise owners and financial advisors who are highly engaged that are looking for support in creating systemized operations, enhancing their value proposition, increasing efficiencies and who are committed to evolving their business.

What's in it for the enterprise firm owner?

At the enterprise level you will receive a fully customized practice management offering, retreats and webinar series that is branded for your firm. As a firm owner, you receive personalized monthly consulting to address areas of focus for your enterprise, yearly invites to our Leaders Summit, specialized reporting and much more.

What will I learn? Benefit from?

Leadership Advantage is designed to enhance a firm's value and drive growth by implementing streamlined systems and operations to simplify crucial business functions. It will also help you form a long-term strategy for scalability, stability and growth, using analytical tools and repeatable, time-proven expertise for continual business enhancement. In addition, Leadership Advantage will help you:

- Monetize the value of your enterprise
- Streamline investment philosophies
- Develop recruiting initiatives
- Provide a community of growth oriented advisors

What do I have to do?

In general, we expect that you will commit the necessary attention over the engagement and participate in webinars, retreats and assignments given. A more formal and detailed description will be provided at your initiation meeting.

How much does it cost?

The program comes at no monetary cost to you or your attendees. Just your participation, engagement and desire to improve!

How long is it?

Leadership Advantage spans 12 months with 2 retreats per year and monthly consulting webinars. We also have an extension program called **MORE** that adds an additional 12 months of access to business consulting tools and resources.

10 ways we think Leadership Advantage can help your advisors.

1. **Enhance their client experience and firm operations**
2. **Instill a robust client review process**
3. **Create a collaborative advisor setting, where best practices and ideas are shared**
4. **Increase efficiencies in their practice**
5. **Build a systematized approach to maintaining strategic relationships and referrals**
6. **Help them gain more control of their time— personally and professionally**
7. **Lead them towards business growth**
8. **Bring fresh ideas to their marketing strategy**
9. **Segment their client base to identify fee improvement areas**
10. **Introduce latest technologies that can improve how you work**

Topic Areas Covered

(Customization available upon request)

- | **Business Assessment & Benchmarking**
- | **Client Segmentation Analysis**
- | **Creating a Powerful Strategic Plan**
- | **Service Model & Fee Schedules**
- | **Firm Mission, Vision & Values**
- | **Prospecting and New Clients**
- | **Marketing Plan**
- | **Client Review Process**
- | **Center of Influence Process**
- | **Value Proposition**
- | **Referral Management**
- | **Branding and Marketing**
- | **The Power of Your Client Experience**
- | **Business Value and Planning**
- | **Investing in Team Performance**
- | **Efficient Time Management**
- | **Engaging with Technology**
- | **Family Preparedness**



Questions? Email us at leadershipadvantage@assetmark.com

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106236 | M23-102119 | 08/2023