

Leadership**Advantage**SM

Everyone
wants to
grow their
business.

Do you have a plan?

An Immersive Environment that Breeds Success.



Whether you're an enterprise leader or an independent financial advisor, when you're busy running your business—meeting with clients, managing your team, and marketing your services—strategically planning for growth can take a back seat. The good news is you don't need to know it all.

AssetMark Leadership Advantage provides a **fully customizable practice management program to help drive growth**. Our exclusive program provides the infrastructure, tools, and resources to increase efficiencies and your overall business value.

What you can expect.

We teach business essentials designed to help accelerate your firm by showing you how to:

- 1 Implement strategies for growth
- 2 Empowering your team and applying business fundamentals
- 3 Optimize operations and deliver a personalized client experience
- 4 Enhance your marketing strategies

Depending on your role as an enterprise leader or independent financial professional, your participation may vary across the different modules, retreats, and services:

Discovery & On-Boarding

Participate in discovery meetings and complete on-boarding materials to ensure alignment on business goals and optimize your time.

Retreats

Focus on best practices, working sessions, and actionable solutions with your peers during in-person workshops.

Webinars

Meet virtually in our monthly webinars to review concepts and strategies for implementation between in-person retreats. These 45-60 minute webinar sessions are recorded for repeated and future viewing.

Access to Business Tools

Ongoing access to interactive tools, modules, and resource libraries through an exclusive landing page for easy access and download capabilities.

Consulting

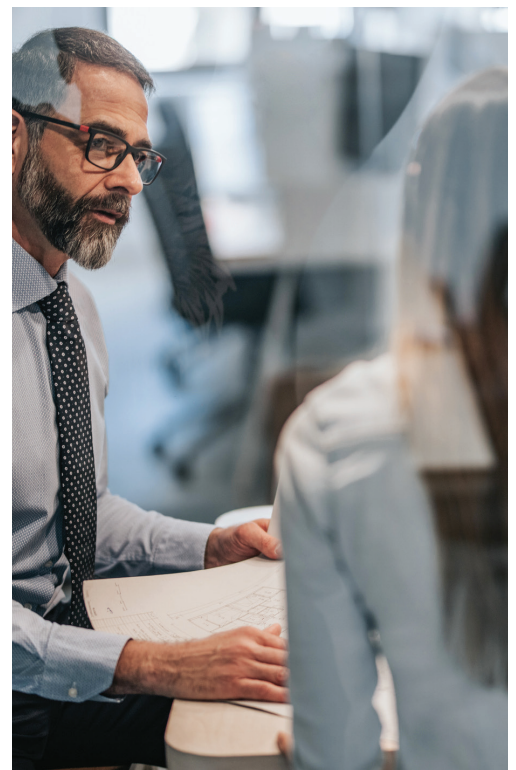
Schedule consulting support calls directly with your consultant for work review, strategy, planning and implementation discussions.

For Firm Owners

- Monthly strategic call to review program progress
- Enterprise value maximization road map
- Recruiting strategy development (*field sales introductions & profile distribution*)
- Specialized quarterly reporting
- Opportunity to attend our annual Leaders' Summit

For Advisors

- Monthly topical webinars to practice, engage and implement what you've learned.
- Opportunity to have personalized follow-ups with a business consultant

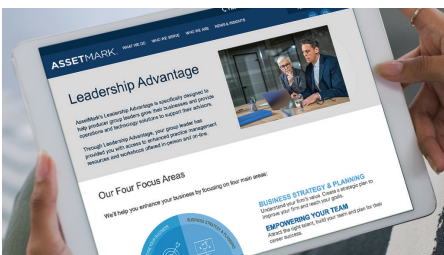


Testimonials

Here are some comments from past participants.



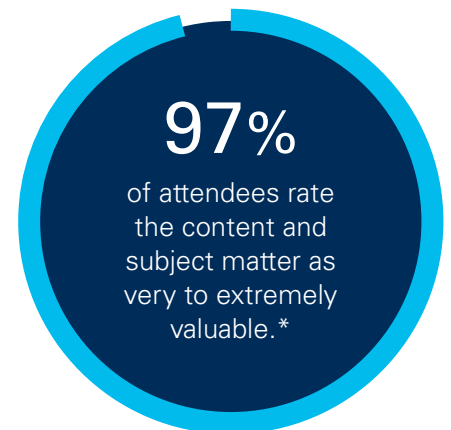
Getting ideas that can impact my business today, and in the future is priceless.



Ton of useful info, technology upgrade examples, and templates to use in practice.



I feel like the course and the worksheets are like a college course or a new designation on how to run a successful investment practice.



By ensuring you have an actionable plan and integrating it daily, necessary changes become easier, ultimately driving progress toward a more profitable business.

Contact leadershipadvantage@assetmark.com to learn more.

*Source: AssetMark Leadership Advantage Completion Surveys

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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.

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