



CENTER FOR FINANCIAL PLANNING

NEWS RELEASE

AssetMark Supports CFP Board Center for Financial Planning as Chairs Circle Sponsor

Sponsorship will support Center's work to advance the financial planning profession

Washington, D.C., March 6, 2018 – The [CFP Board Center for Financial Planning](#) today announced that AssetMark, Inc. will support its work as a Chairs Circle Sponsor.

“The Center’s work to address critical challenges facing the financial planning profession requires the collective resources from stakeholders across the profession,” said Marilyn Mohrman-Gillis, Executive Director of the CFP Board Center for Financial Planning. “We are grateful to AssetMark for sharing in our vision and for their generous contribution of expertise, thought leadership and financial support for initiatives that will diversify and sustain the workforce.”

Charlie Fitzgerald, III, CFP®, member of the Certified Financial Planner Board of Standards, Inc. Board of Directors and the Center’s Campaign Development Committee, attended AssetMark’s Gold Forum in Orlando, Florida on Friday to accept the donation on behalf of the CFP Board Center for Financial Planning.

AssetMark’s giving commitment of \$250,000 over five years aligns with the Center's mission to create a more diverse and sustainable financial planning profession so that every American has access to competent and ethical financial planning. The Center is convening the profession in researched-based initiatives to address the many challenges facing the financial planning profession, including an aging workforce that does not reflect the diversity of the public that it serves and a shortage of qualified faculty to teach and inspire the next generation of financial planning professionals.

“All of us at AssetMark are extremely excited to contribute to the Center’s work. Enhancing diversity in our industry is critical as advisors begin to serve a new generation of investors, and doing so by teaching the next generation of advisors from all backgrounds and experiences is a major opportunity for all of us,” said Charles Goldman, President and CEO of AssetMark. “We are thrilled to partner with the Center because they have a plan that will move us toward a more diverse advisor workforce.”

AssetMark Chief Solutions Officer Natalie Wolfsen sits on the Center's Workforce Development Advisory Group and helps guide initiatives and communications that foster greater diversity in the industry. AssetMark also plans to expand its support beyond a monetary donation to encourage younger and more diverse individuals to consider a career as an independent financial advisor.

To learn more and support the Center's initiatives, visit www.CenterforFinancialPlanning.org. The work of the Center is also made possible through Center sponsors, including Lead Founding Sponsor TD Ameritrade Institutional and Founding Sponsor Northwestern Mutual.

ABOUT ASSETMARK, INC.

AssetMark, Inc. is a leading independent provider of innovative investment and consulting solutions serving financial advisors. The firm provides investment, relationship and practice management solutions that advisors use to help clients achieve their investment objectives and life goals. AssetMark, Inc., including its Savos and Aris divisions, has more than \$42 billion in assets on its platform and a history of innovation spanning over 20 years. For more information, visit www.assetmark.com and follow [@AssetMark](https://twitter.com/AssetMark) on Twitter.

ABOUT CFP BOARD

The mission of Certified Financial Planner Board of Standards, Inc. is to benefit the public by granting the CFP® certification and upholding it as the recognized standard of excellence for competent and ethical personal financial planning. The Board of Directors, in furthering CFP Board's mission, acts on behalf of the public, CFP® professionals and other stakeholders. CFP Board owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, CFP® (with plaque design) and CFP® (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements. CFP Board currently authorizes over 80,000 individuals to use these marks in the U.S.

ABOUT the CFP BOARD CENTER FOR FINANCIAL PLANNING

The CFP Board Center for Financial Planning seeks to create a more diverse and sustainable financial planning profession so that every American has access to competent and ethical financial planning advice. The Center brings together CFP® professionals, firms, educators, researchers and experts to address profession-wide challenges in the areas of diversity and workforce development, and to build an academic home that offers opportunities for conducting and publishing new research that adds to the financial planning body of knowledge. More about the Center and its initiatives can be found at www.CenterforFinancialPlanning.org.

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