

The Power of Outsourcing Investment Management

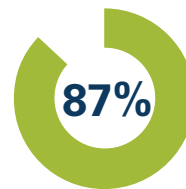
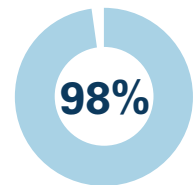
In order to better understand the barriers and the benefits of outsourcing, AssetMark engaged Q8 Research to survey over 700 financial advisors on the topic of investment management outsourcing.



MORE THAN 3 OUT OF 4

78% of advisors wish they had outsourced assets sooner and 79% plan to increase the percentage of outsourced assets in the next three years.

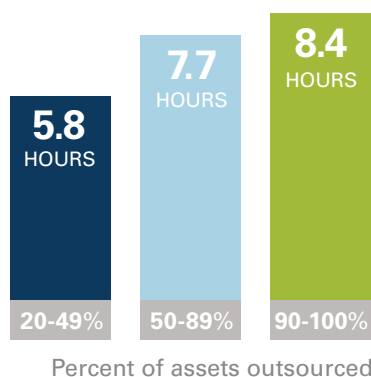
98% of outsourcing advisors surveyed stated they delivered better investment solutions due to outsourcing.



Nearly **9** out of **10** outsourcing advisors surveyed stated that the benefits of outsourcing investment management have met or exceeded their expectations.

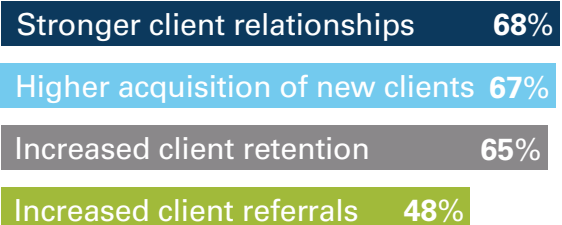
Advisors noted a time benefit of more than 8 hours per week when nearly all investment management tasks were outsourced.

HOURS SAVED PER WEEK ON INVESTMENT MANAGEMENT:



Advisors who outsourced investment management reported stronger client relationships, higher retention and increased acquisition rates.

% OF ADVISORS WHO SAY OUTSOURCING HELPS DELIVER:



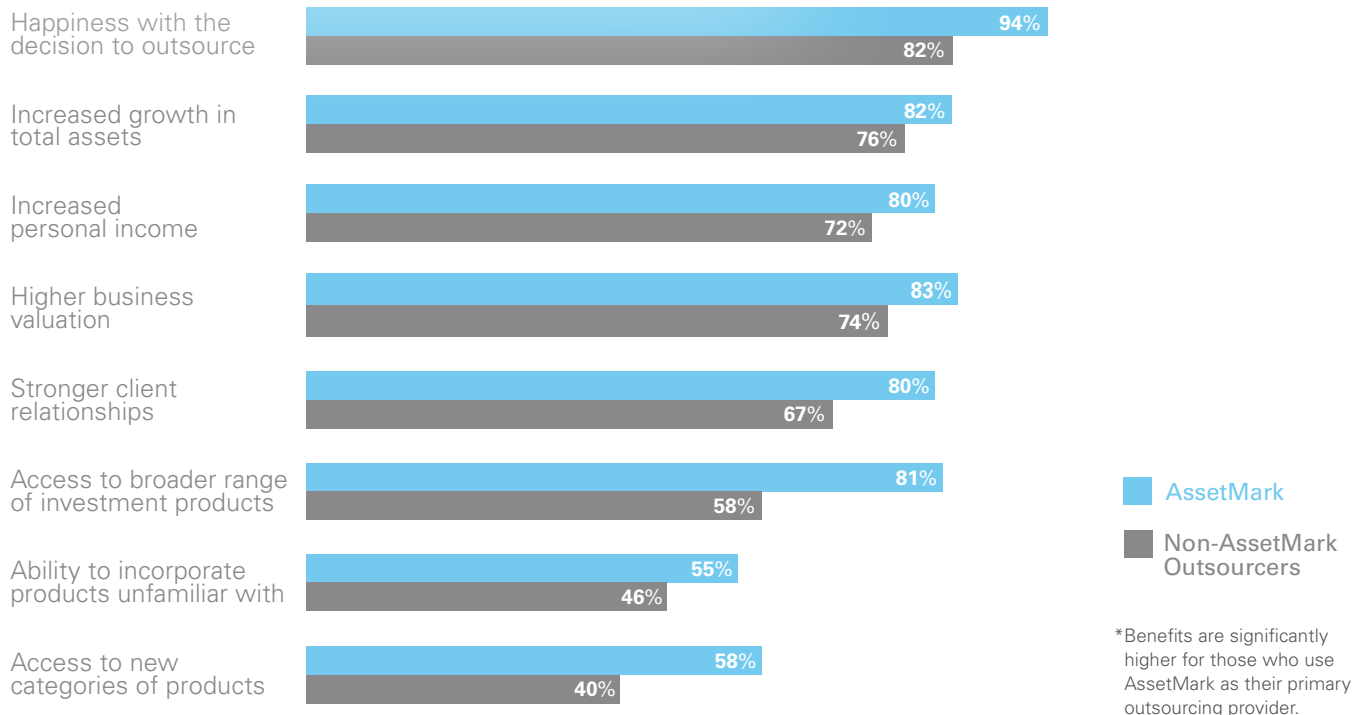
Advisors who outsourced experienced a growth in their total assets under management, higher personal income and lower operating costs for their practice. The same advisors quantify this benefit as delivering, on average, double digit improvement across all three factors.

77% experienced on average:
27%
 ▲ **GROWTH**
 in total assets under management

72% experienced on average:
26%
 ▲ **HIGHER**
 personal income

67% experienced on average:
17%
 ▼ **LOWER**
 operating costs

GREATER BENEFITS FROM OUTSOURCING WITH ASSETMARK*



START YOUR OUTSOURCING JOURNEY WITH ASSETMARK

If you'd like to learn more about how AssetMark can help you get started on outsourcing investment management, we're here to help. Email us at AMBUSINESSCONSULTING@ASSETMARK.COM or give us a call at **833-273-0409**.

Source: AssetMark 2019 Impact of Outsourcing Study.

AssetMark, Inc.

1655 Grant Street
 10th Floor
 Concord, CA 94520-2445
 800-664-5345

Important Information

AssetMark, Inc. is an investment management and consulting firm serving independent, financial advisors to help them build great businesses. This report is for informational purposes only, is not a solicitation, and should not be considered investment 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.

AssetMark, Inc. is an investment adviser registered with the U.S. Securities and Exchange Commission.
 ©2020 AssetMark, Inc. All rights reserved.

31061 | C33623 | 07/2020 | EXP 07/31/2022