



MEDIA CONTACT:
Andrew Jarrell, Group Gordon
ajarrell@grouppgordon.com
(212) 784 5721



MEDIA CONTACT:
Marc Fiore
mfiore@paraport.com
(206) 437 9942

AssetMark Collaborates with Parametric to Launch Custom Portfolios for High-Net-Worth Investors

***New strategy uniquely combines equity and fixed-income investments
with tax-managed solutions in a single account***

CONCORD, CA and SEATTLE, WA— May 22, 2017 — AssetMark, Inc., a leading provider of innovative investment and consulting solutions, is expanding its high-net-worth capabilities with the launch of a new strategy from Parametric, a leading global asset management firm and affiliate of Eaton Vance.

The solution, “Parametric Custom Portfolios,” is new to AssetMark’s platform and employs a number of unique diversification, risk and tax-management features to deliver custom, passive investment-based portfolios for high-net-worth investors. Parametric will provide its tax-management expertise to the strategy, with Eaton Vance serving as the fixed-income subadvisor.

“This is the next step in our long-standing commitment to help advisors serve their most complex clients’ needs,” said Natalie Wolfsen, EVP and Chief Commercialization Officer for AssetMark. “This solution offers lower-cost, passive portfolios, while also delivering customization and tax management that high-net-worth investors require.”

Parametric Custom Portfolios offers many innovative features, including advanced diversification strategies that limit risk. For instance, it combines passive, tax-managed equity exposure with bond ladders in a single account. In addition, the strategy provides key tax-management benefits, including tax-loss harvesting, capital-gains deferral, and tax-efficient transition strategies. The models offered through the AssetMark platform are particularly well-suited for advisors who are using ETF models, but who are interested in achieving greater customization and tax efficiency.

“It’s great to partner with AssetMark to deliver this product into the hands of independent financial advisors,” said Robert Breshock, Managing Director at Parametric. “The strategy reinforces our commitment to being responsive to the way investors want to build portfolios. We have stayed true to our firm’s DNA by focusing on diversification, risk and tax management. This launch reflects the continuing expansion of Parametric’s custom solutions in the marketplace.”

“Eaton Vance and Parametric have aligned with AssetMark to build a custom strategy to help advisors deliver better, tailored client outcomes,” said John Moninger, Managing Director, Retail Sales for Eaton Vance. “Eaton Vance’s experienced sales team and distribution capabilities will be bringing these solutions to financial advisors in the marketplace.”

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 \$35 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 Parametric and Eaton Vance

Parametric, headquartered in Seattle, WA, is a leading global asset management firm, focused on the delivery of engineered portfolio solutions, including rules-based alpha-seeking equity, alternative and options strategies, as well as implementation services including custom core equity, futures overlay and centralized portfolio management. As of March 31, 2017, Parametric managed approximately \$197.7 billion in total assets. Parametric is a majority-owned subsidiary of Eaton Vance Corp., and its principal investment centers are located in Seattle, WA, Minneapolis, MN, and Westport, CT. For more information about Parametric, visit parametricportfolio.com.

Eaton Vance (NYSE: EV) is a leading global asset manager whose history dates to 1924. With offices in North America, Europe, Asia and Australia, Eaton Vance and its affiliates managed \$380.9 billion in assets as of March 31, 2017, offering individuals and institutions a broad array of investment strategies and wealth management solutions. The Company's long record of providing exemplary service, timely innovation and attractive returns through a variety of market conditions has made Eaton Vance the investment manager of choice for many of today's most discerning investors. For more information, visit eatonvance.com.

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