



MEDIA CONTACT:  
 Andrew Jarrell, Group Gordon  
[ajarrell@groupgordon.com](mailto:ajarrell@groupgordon.com)  
 (212) 784 5721

## AssetMark Honors Financial Advisors with Community Inspiration Award at Annual Gold Forum Event

*Firm recognizes six financial advisors for outstanding commitment to local communities, donates \$62,500 to nonprofits*

**CONCORD, CA** — February 28, 2017 — AssetMark, Inc., a leading provider of innovative investment and consulting solutions serving financial advisors, today announced the six recipients of its fourth annual Community Inspiration Award honored at AssetMark’s Gold Forum conference that took place in Laguna Niguel, California. In recognition of their contributions and sustained support of charitable organizations in their communities, AssetMark is donating \$10,000 to a nonprofit organization supported by each selected advisor. Additionally, AssetMark is donating \$2,500 to the [Pacific Marine Mammal Center](#) in Laguna Niguel to give back to the local community.

This year’s honored advisors and organizations receiving donations are:

Advisor	Firm Name	Charitable Organization
<a href="#">Eric Caisse</a>	Csenge Advisory Group	<a href="#">Beat NB</a>
<a href="#">Adam Ciepiela</a>	Charles Stephen & Company	<a href="#">Junior Achievement of New Mexico</a>
<a href="#">Jay Dryden</a>	Vector Wealth Strategies, LLC	<a href="#">AGAPE of North Alabama, Inc.</a>
<a href="#">Kari Jo Thomann Bear</a>	Thomann Financial Services, Inc.	<a href="#">Liberty Hospital Foundation</a>
<a href="#">Sherri Frank Weintrop</a>	Wealth Management Advisors, Inc.	<a href="#">Covenant Place - A Community for Seniors</a>
<a href="#">Victoria Woods</a>	ChappelWood Financial Services	<a href="#">YWCA Oklahoma City</a>

“We’re incredibly proud to honor these advisors who are working to create great outcomes for their clients and a positive impact on the organizations that support their communities,” said Charles Goldman, President and CEO of AssetMark. “Advisors are in a unique position to help individuals evaluate and achieve their financial goals. Helping organizations is a natural extension of that. We hope that the outstanding achievements of these individuals inspire others to consider how they can contribute to their communities.”

Award recipients were selected by a panel of senior executives at AssetMark, who evaluated nominees based on their ability to inspire, lead and motivate others, in addition to their time and effort dedicated to a local charity. Echoing the firm’s values of “Heart, Excellence, Integrity, and Respect,” the Community Inspiration Award provides one of many opportunities for AssetMark’s associates and advisors to connect with and promote their shared values by submitting nominations for the award. All nominees met a variety of requirements and could not hold an officer position within their associated charities. All nonprofit recipients are qualified 501(c)(3) organizations.

### **About AssetMark, Inc.**

AssetMark 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. has more than \$32 billion in combined assets on its platform and a history of innovation spanning over 20 years. For more information, visit [www.assetmark.com](http://www.assetmark.com) and follow [@AssetMark](https://twitter.com/AssetMark) on Twitter.

###