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AssetMark Launches Interactive Business Assessment Tool for Advisors

Quickly Shows Estimated Firm Value, Sustainability, Growth Potential, and Transferability

CONCORD, CA — June 27, 2017 — AssetMark, Inc., a leading provider of innovative investment and consulting solutions, is launching a free, online [business assessment tool](#) for financial advisors that will help them determine the estimated value of their businesses, identify areas of strength and pinpoint opportunities for improvement. The tool is powered by AssetMark’s proprietary Value Maximization Index®, which assesses business risk factors and compares them versus top industry benchmarks. These comparisons help to pinpoint aspects of the business that may need attention including practice management, marketing, operations and staffing as well as an overall valuation score relative to industry benchmarks.

The tool will also help advisors evaluate merger and acquisition opportunities by providing a sophisticated view of business valuation. Additionally, AssetMark is offering free resources that help advisors identify ideal buyers or sellers, conduct due diligence, and transition clients.

“We have a long tradition of working side-by-side with advisors to help them create great outcomes for their clients while also driving firm growth and building strong businesses,” said Natalie Wolfsen, EVP and Chief Commercialization Officer for AssetMark.

With the combined pressures of an ever-changing regulatory environment and increasing demand for lower-cost products, it’s critical that advisors objectively analyze their businesses to stay viable and competitive. “We’re excited to offer this tool to advisors who want to focus on building more efficient businesses so that they have more time to spend helping their clients achieve their goals,” added Matt Matrisian, SVP Strategic Initiatives at AssetMark.

The Business Assessment Tool serves as an extension of AssetMark’s Practice Management expertise, which is a differentiator for the firm. In addition to providing a business assessment and valuation, advisors accessing the tool online will find downloadable resources that help them implement the improvements suggested for their firms, including how to market their businesses, optimize operations, and empower staff.

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 \$36 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](#) on Twitter.