



AssetMark Launches Suite of Separately Managed Accounts

AssetMark SMA Suite empowers advisors to meet the changing needs of their clients

Concord, Calif. —September 7, 2021—[AssetMark](#) (NYSE: AMK) today announced the launch of a suite of separately managed accounts (SMAs) available on the AssetMark platform. Designed to help advisors tailor portfolios for their clients, the curated selection of professionally managed SMAs covers a wide breadth of asset classes, investment styles and asset managers.

“Advisors are facing growing demand to tailor portfolios to meet the unique needs and objectives of each client,” said AssetMark Executive Vice President, Head of Investment Solutions David McNatt. “The vast SMA marketplace can make it challenging for advisors to find the best strategy to meet their clients’ need. Through our rigorous due diligence process, we’ve curated this lineup of SMAs providing core asset class building blocks for advisors to choose with confidence and deliver on their clients’ expectations.”

This launch will include twelve SMAs from ten best-in-class investment managers, many of whom are new to the AssetMark platform. As investor preferences continue to evolve, SMAs can enable advisors to personalize clients’ portfolios with targeted asset class exposure and manage their tax efficiency, as well as offer increased transparency through direct ownership of securities. This new suite of SMAs complements the wide range of investment solutions on the AssetMark platform and can be combined in a single account with other eligible solutions.

“While we are excited to add this new suite of SMAs to our curated platform, it is just the beginning. We will continue to broaden the product suite in response to market demands and to help advisors effectively manage the evolving needs of their clients,” said McNatt.

About AssetMark Financial Holdings, Inc.

AssetMark is a leading provider of extensive wealth management and technology solutions that power independent financial advisors and their clients. Through AssetMark, Inc., its investment advisor subsidiary registered with the Securities and Exchange Commission, AssetMark operates a platform that comprises fully integrated technology, personalized and scalable service and curated investment platform solutions designed to make a difference in the lives of advisors and their clients. AssetMark had \$84.6 billion in platform assets as of June 30, 2021 and has a history of innovation spanning more than 20 years.

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