



MEDIA CONTACT:
Jill Epstein, Group Gordon
jepstein@grouppgordon.com
(212) 784 5698

AssetMark Acquires Global Financial Private Capital

More than 300 advisors with \$5.7B in AUM to join curated platform of solutions designed to take them to the next level.

CONCORD, CA — August 13, 2018 — AssetMark, Inc., a leading provider of innovative investment and consulting solutions, announced today that it has agreed to acquire Global Financial Private Capital, an established, relationship-based organization providing institutional-level wealth management capabilities to its elite independent advisors and their clients. The transaction is expected to close by the end of the year.

“AssetMark is dedicated to building deep relationships and making a difference in the lives of both advisors and their clients, and this transaction allows us to help even more valued advisors realize their dreams of running great businesses and helping investors achieve their goals,” said Charles Goldman, President and CEO of AssetMark. “Our firms share the same core values and we have an incredible alignment of focus that will benefit the advisor community.”

“This transaction will accelerate our ability to deliver the comprehensive and compelling capabilities that our advisors require and deserve as elite independent advisors,” said Global Financial CEO Michael Bell. “The Global Financial team is looking forward to working closely with AssetMark to integrate our platforms and providing our advisors with a market-leading foundation that is proven to help independent advisors grow and prosper.”

Upon completion of the purchase, Global Financial advisors will have access to AssetMark’s innovative approach to investing and a broad range of well-known investment solutions and custom high-net-worth solutions. They will also benefit from AssetMark’s compelling technology to easily scale their businesses and show insight and value to their clients with robust planning and analytic tools.

With over 20 years of experience, AssetMark has a long history of helping advisors succeed, and offers dedicated thought leadership and practice management tools and resources to help them realize untapped opportunities and equip them for success. Through AssetMark’s Premier Consultant Program, advisors receive one-on-one practice management support, specialized services and invitations to exclusive meetings and events. Plus, AssetMark’s service teams are segmented to provide advisors with the highest levels of service and support in the industry, including expert hands-on guidance, operational support, and overall efficiency.

RBC Capital Markets served as exclusive financial advisor to Global Financial Private Capital in this transaction.

About AssetMark, Inc.

AssetMark, Inc., an investment adviser registered with the Securities and Exchange Commission, is a leading independent provider of innovative investment and consulting solutions serving financial advisors. The firm provides investment, relationship and practice management solutions designed to make a difference in the lives of advisors and their clients. AssetMark, Inc., including its Savos and Aris divisions, has more than \$46 billion in assets on its platform as of 7/31/18 and a history of innovation spanning over 20 years. For more information, visit assetmark.com or follow AssetMark on [Twitter](#) or [LinkedIn](#).

About Global Financial Private Capital

Global Financial Private Capital is an independent Registered Investment Advisor (RIA) that provides comprehensive, flexible solutions to help advisors build a custom advisory practice. Global Financial empowers advisors with strategic investment solutions, practice management guidance, business consulting services and state-of-the-art technology. Global Financial Private Capital was founded in 1991, and has more than \$5.7 billion in combined assets under management (AUM) on its platforms as of 12/31/17.

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