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AssetMark Holds Second Annual Customer Obsession Week to Celebrate Financial Advisors

Executive team to lead customer outreach and events, deepening client relationships and encouraging collaboration

CONCORD, CA — May 28, 2019 — AssetMark, Inc., a leading provider of innovative investment and consulting solutions, kicked off its second annual Customer Obsession Week to celebrate and appreciate its clients. Throughout the week, AssetMark employees and executives will participate in internal and external events to showcase and develop the firm’s culture of service and commitment to its clients.

“AssetMark is laser-focused on delivering capabilities that make a difference in the lives of financial advisors,” said Carrie Hansen, EVP, Chief Operating Officer at AssetMark. “We pride ourselves on developing meaningful connections with each and every one of our clients, and Customer Obsession Week is just another way to show advisors how much they mean to us.”

During the week, AssetMark’s executive team will join the firm’s relationship managers on client calls to inspire excitement around the concept of customer obsession, giving executives the opportunity to strengthen internal relationships and generate enthusiasm for delivering personalized service.

“Customer obsession is a mindset that we foster among our employees year-round,” said Brad Wheeler, SVP of Operations at AssetMark. “Customer Obsession Week is a time to celebrate our clients and reinforce the mission of our firm, helping advisors make a difference in their clients’ lives.”

Activities during the week are tied to a series of online and social media campaigns that include emails to employees with tips for fostering client connections and examples of strong employee-advisor written communications. Eight advisors and their staff whose work exemplifies the engaged, client-focused attention that AssetMark values will be recognized for accuracy, best practice or service excellence with a personalized plaque and lunch delivery for the entire office.

To maintain its Customer Obsession mindset year-round, AssetMark hosts frequent Customer Obsession Bootcamps where associates share tips for incorporating a customer-obsessed approach in their work and fostering stronger connections with financial advisors. Extensive coaching, monitoring, and written guidance are also provided throughout the year to promote meaningful connections. This year AssetMark is also introducing the ECHO (Emotionally-Connected, Helpful and Obsessed) awards for best call, best email and best teammate, to highlight on true customer obsession and emotional connection at work.

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 \$49 billion in assets on its platform as of March 31, 2019 and a history of innovation spanning more than 20 years. For more information, visit assetmark.com or follow AssetMark on [Twitter](#) or [LinkedIn](#).

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