



AssetMark Names David McNatt Executive Vice President, Head of Investment Solutions

McNatt will lead the company's center of excellence for investment solutions and experience

Concord, Calif.—June 7, 2021—[AssetMark](#) (NYSE: AMK) announced it has named David McNatt, CFA, as Executive Vice President, Head of Investment Solutions. He was most recently Senior Vice President, Product Strategy and Management for AssetMark. With this promotion, McNatt joins the AssetMark Executive Team under CEO Natalie Wolfson.

McNatt has led Product Strategy and Management for the last six years, responsible for managing solutions across the development lifecycle, driving adoption and optimizing revenue. Previously, he held senior leadership roles at Russell Investments, Charles Schwab and Franklin Templeton. In his career, McNatt has developed and launched more than 45 products and services representing \$160B in assets.

In his new role, McNatt will oversee four main groups for AssetMark including: Product Strategy & Development; Platform Investment Strategy; Investment Management; and Investment Service and Operations. McNatt's team will be focused on delivering the investment solutions and experience required to meet evolving advisor and investor needs.

"I am pleased to add David as the newest member of our executive team," said AssetMark CEO Natalie Wolfson. "David's wealth of experience, and extensive knowledge of AssetMark's business, our advisors' investment needs and industry trends, make him a natural fit for this new role which is focused on investment innovation and growth for the firm. Putting our investment and product teams under one umbrella will allow for greater synergy between these areas. This is an exciting time for AssetMark, and we look forward to David leading our investment team as we serve our mission to make a difference in the lives of advisors and investors."

In his new role, McNatt will continue to lead the Product Management Team and will also oversee Investment Management and Strategy. AssetMark's new Chief Investment Officer Jason Thomas, PhD, will report to McNatt leading the Investment Management Team responsible for all AssetMark managed investment solutions and ongoing strategy research and development. Thomas is replacing current AssetMark CIO Jerry Chafkin who will be retiring this fall. Chief Investment Strategist, Zoe Brunson, CFA, will also report to McNatt leading the Platform Investment Strategy Team responsible for due diligence, investment consulting and quantitative research.

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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 \$78.9 billion in platform assets as of March 31, 2021 and has a history of innovation spanning more than 20 years.

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Source: AssetMark, Inc. / AssetMark Financial Holdings, Inc.

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