

AssetMark Launches Marketing Advantage Platform

Marketing Advantage empowers advisors to enhance their brand, deepen client relationships and attract new business

CONCORD, Calif. — February 3, 2022 — AssetMark today announced the launch of AssetMark Marketing Advantage, an all-in-one marketing platform that helps financial advisors build relationships and grow their businesses with a robust suite of ready-to-use tools.

The omnichannel marketing platform features a comprehensive collection of client-facing and compliance-friendly content including videos, articles, emails, social media, and infographics. It provides advisors with best-practice marketing and practice management resources, as well as CRM integration, automated email campaigns and a turnkey event dashboard. Advisors can leverage the platform to easily customize a modern, mobile-optimized website that seamlessly integrates with all the available content.

Paired with AssetMark’s personalized business consulting expertise and proprietary thought leadership, Marketing Advantage gives financial advisors the ability to market their practice in a scalable, targeted way that helps drive growth and fosters effective client communication.

“Amid an increasingly competitive industry, digital marketing is more important than ever for firms looking to effectively showcase their business,” said Matt Matrisian, Senior Vice President, Chief Channel Officer at AssetMark. “AssetMark Marketing Advantage allows them to efficiently implement a powerful marketing strategy while they focus their time and efforts on clients.”

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 \$89.8 billion in platform assets as of November 30, 2021 and has a history of innovation spanning more than 20 years.

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