



## **AssetMark Institutional to Host RIA Summit Providing Deep Dive into RIA Business Models May 25-26**

*Two-day summit will feature guest speakers including Shark Tank's Kevin O'Leary and Nerd's Eye View Publisher Michael Kitces*

**Concord, Calif.—May 3, 2021**—[AssetMark](#) (NYSE: AMK) today announced the first AssetMark Institutional RIA Summit. The RIA Summit will bring together thought leaders from across the industry covering a range of topics that matter to RIAs at any stage, from launching an advisory firm to fine tuning an existing practice, to preparing for mergers and acquisitions. The Summit features insights from leaders in the investment space, including *Shark Tank's* Kevin O'Leary, and *Nerd's Eye View* Publisher Michael Kitces.

The free, virtual, two-day event will take place on Tuesday, May 25 and Wednesday, May 26.

Insights from the RIA community will include:

- Latest trends impacting the independent advisor and opportunities for growth;
- Building professional relationships and leveraging technology to scale your business;
- How investing in private markets has evolved;
- Solutions to serve the needs of ultra-high-net-worth investors;
- Issues facing your clients and how to work with them to achieve their financial goals.

"We are thrilled to host our first summit for the RIA community," said AssetMark CEO Natalie Wolfsen. "We have designed this event to deliver content catered to meeting the specific needs of registered independent advisors, which will help them better prepare for industry shifts and the evolving needs of investors. Attendees will have the opportunity to expand their skills, engage with their peers, and explore ways to prepare their businesses for the future."

For a complete agenda, and to register for the Summit, please visit:

<https://cvent.me/Xn07R1?rt=msLY8XDhN0ughK89n8qMXA&RefId=Media>.

### **About AssetMark Financial Holdings, Inc.**

AssetMark is a leading provider of extensive wealth management and technology solutions that help financial advisors meet the ever-changing needs of their clients and businesses. Through AssetMark, Inc., its investment adviser subsidiary registered with the U.S. Securities and Exchange Commission, AssetMark operates a platform that brings together fully integrated technology, personalized and scalable service, and curated investment solutions to support financial advisors and their businesses. For more than 20 years, AssetMark has focused on offering the solutions and services that help financial advisors grow. AssetMark had \$74 billion in platform assets as of December 31, 2020. For more information visit [assetmark.com](https://assetmark.com).



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