



AssetMark Gathers Leading Financial Advisors for Exclusive Gold Forum Event

*Matthew McConaughey, Doris Kearns Goodwin, Kevin O’Leary, and Ben Nemtin
Among Special Keynotes Discussing Growth, Leadership and Resiliency*

Concord, Calif.—March 16, 2021—[AssetMark](#) (NYSE: AMK) today announced that its annual Gold Forum event, held virtually for the first time last month, was a tremendous success. The exclusive, invite-only event gathered AssetMark’s top independent financial advisor clients for an interactive experience designed to connect, inspire, and learn.

For three days, virtual attendees participated in over 30 feature presentations with special interactive discussions led by such well-known public speakers as: Academy Award winning actor and New York Times best-selling author Matthew McConaughey, Pulitzer Prize-winning presidential historian Doris Kearns Goodwin, Shark Tank star Kevin O’Leary, and #1 New York Times best-selling author Ben Nemtin. Fidelity, Pershing, CIBC, Clark Capital, and other financial leaders also joined AssetMark subject matter experts in presenting strategies and best practices that have helped advisors grow and adapt in a disrupted, digitally-driven world. Other community-building event highlights included a panel on women in financial services--led by female leaders from The Ameriflex Group, Hudson Financial Services, and Stratos Wealth Partners--as well as a virtual happy hour and magic show to provide community and fun for advisors and their families.

In a special Q&A, President Michael Kim interviewed newly-appointed CEO Natalie Wolfson about AssetMark’s continued commitment to delivering the technology, investment solutions, and business consulting expertise that empower advisors to address the growth and client servicing opportunities driven by today’s tremendous pace of change. The growth and client experience themes prevailed throughout the event with deeper discussions on wealth planning, succession planning, M&A, protecting clients from cyber criminals, and winning and retaining high-net-worth clients.

“2020 was a year of significant transformation and accelerated change in our industry,” said AssetMark CEO Natalie Wolfson. “We find it incredibly valuable to bring together leading advisors and industry experts as a community in this unique forum to look closely at the companies that have thrived during this time and discuss what they did to transform or even reengineer the client experience for continued growth. It’s another way AssetMark is committed to advisors just as they are there for the investors whose dreams they help make come true every day.”

To learn more about AssetMark’s events designed to support financial advisors, visit assetmark.com/events.

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.

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