



## **AssetMark Launches Alternative Investments by iCapital Network®**

*Latest AssetMark Offering Builds on Company's Commitment to Helping Financial Advisors Attract and Serve High-Net-Worth Clients*

**Concord, Calif. and New York—April 27, 2021—**[AssetMark](#) (NYSE: AMK), and [iCapital Network](#)<sup>1</sup>, today announced the launch of *AssetMark Alternative Investments by iCapital*, a customized alternative investments service on the AssetMark platform. The solution provides a curated selection of fully diligenced alternative investments with low minimums and a seamless end-to-end investing experience to support independent advisors in attracting and serving high-net-worth (HNW) clients.

*AssetMark Alternative Investments* augments the investment solutions available to independent registered investment advisors (RIAs) on the AssetMark platform with alternative investment strategies designed to address the diversification and return objectives of qualified HNW investors. The offering provides access to alternative investment managers professionally diligenced by iCapital, through a convenient, best-in-class user experience. It features an integrated, single sign-on with automated subscription and administration, document management, and reporting.

Historically, individual investors have had limited access to top-tier alternatives managers with appropriately low investment minimums. *AssetMark Alternative Investments by iCapital* addresses this challenge for financial advisors. RIAs can access and manage their client portfolios while leveraging robust educational content from iCapital. These solutions will help RIAs grow and differentiate their business as demand for alternative investments increases among all investor types; Prequin's "[Future of Alternatives 2025](#)" report suggests that global alternative assets under management could grow from \$10.7 trillion in 2021 to 17.2 trillion in 2025.

"With *AssetMark Alternative Investments by iCapital*, AssetMark is building on its commitment to providing innovative solutions that help RIAs attract and serve high-net-worth clients," said David McNatt, SVP, Investment Product Management & Development at AssetMark. "Both AssetMark and iCapital Network are dedicated to providing unparalleled service and experiences that support each advisor's high level of service and alternative asset class access to clients for greater differentiation in a demanding market. We're proud to be working with them on this important new offering."

"It is critical for advisors to meet the burgeoning appetite for private market investments of their qualified investors with the same breadth of options and efficiency as more traditional investments," said Dan Vene, Co-Founder & Managing Partner, Head of Client Solutions at

iCapital Network. “We are proud to be working with AssetMark to bring this innovative alternative investments solution to the thousands of advisors interested in offering private market opportunities to their affluent clients.”

On May 25-26, AssetMark Institutional will host its inaugural [RIA Summit](#) featuring insights from industry experts and business leaders on how RIAs can build successful, scalable businesses. iCapital will discuss how opportunities in private markets investing have evolved and how independent advisors can incorporate these unique investments into their high-net-worth clients’ portfolios.

### **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://www.assetmark.com).

### **About iCapital Network**

iCapital Network’s mission is to power the world’s alternative investment marketplace. Its financial technology platform has transformed the way alternative investments are bought, sold and managed through tech-based solutions for advisors, their high-net-worth client base, wealth management firms, asset managers, and banks. The firm’s flagship platform offers advisors and their clients access to a curated menu of private equity, private credit, hedge funds, and other alternative investments at lower minimums with a full suite of due diligence, administrative support and reporting in a secure digital environment. Wealth management firms use iCapital’s turnkey technology solutions to provide clients with quality funds and simplified operational workflows in an intuitive digital experience. Asset managers and banks leverage iCapital’s tech-enabled services to streamline and scale their private investments operational infrastructure. iCapital was recognized in the 2018, 2019, and 2020 Forbes FinTech 50 and was named Solutions Provider of the Year in the 2020 MMI/Barron’s Industry Awards. As of March 31, 2021, iCapital Network has more than 400 employees and services \$73 billion in global client assets across more than 760 funds.

For additional information, please visit iCapital Network’s website at [www.icapitalnetwork.com](https://www.icapitalnetwork.com) | LinkedIn: <https://www.linkedin.com/company/icapital-network-inc> | Twitter: [@icapitalnetwork](https://twitter.com/icapitalnetwork)

See disclosures [here](#).

**Media Contacts:**

Oliver Hays

MSR Communications for AssetMark, Inc.

[oliver@msrcommunications.com](mailto:oliver@msrcommunications.com)

716-861-6437

Morgan Miller

The Neibart Group for iCapital Network

[icapital@neibartgroup.com](mailto:icapital@neibartgroup.com)

919-602-2806

Source: AssetMark, Inc. and iCapital Network

###

---

<sup>i</sup> Institutional Capital Network, Inc. and its affiliates (together, "iCapital Network" or "iCapital")