



AssetMark Wins Stevie® Award for Customer Service

Concord, Calif.—April 20, 2021—[AssetMark](#) (NYSE: AMK) today announced it has won a 2021 Silver Stevie Award in the Customer Service Department of the Year - Financial Services (100 or More Employees) category. The Stevie Awards for Sales & Customer Service recognize the achievements of contact center, customer service, business development, and sales professionals worldwide.

AssetMark's Service and Operations teams provide highly personalized and scalable service, proven to be the industry's best as indicated by the firm's recent Net Promoter Score of 64. The range of services offered through AssetMark's support teams--from business consulting to back-office administrative support--guides financial advisor businesses at every stage for increased value, growth, and performance.

"AssetMark prides itself in continuously raising the bar for customer service with our deeply-ingrained client-centric, service-oriented culture and service model," said Carrie Hansen, EVP, Chief Operating Officer, President Mutual Funds, AssetMark. "I'm deeply proud of our Service and Operations teams, particularly for how quickly they were able to adapt to the severe and sudden industry and social disruption caused by the pandemic. With the help of our consultants and support teams, our advisors were able to keep their practices functioning smoothly so they could respond to their own client needs."

In 2020, AssetMark ensured they and their advisors would be able to weather the pandemic by getting 100% of company operations and 700+ employees remote within two days while ramping up efforts to meet a dramatic surge in advisor requests. Even as inbound advisor call volume doubled to 2,000 calls per day, AssetMark maintained its commitment to answering calls within 20 seconds.

In August 2020, AssetMark also launched a new dedicated eService team while reinforcing the firm's commitment to fostering deep relationships with advisors in a virtual environment/channel. With the help of executive leadership and the integration of new technologies, the client services team improved the way AssetMark serves clients while continuously supporting advisors and investors through this global crisis.

The 2021 Stevie® Awards for Sales & Customer Service will be presented in a virtual ceremony on Wednesday, April 14.

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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Source: AssetMark, Inc.

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