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AssetMark Launches Savos Personal Portfolios

Investment portfolio solution combines cost-effective investment strategies that are personalized to meet clients' changing needs

CONCORD, CA – September 11, 2019 – AssetMark, Inc., a leading provider of innovative investment and technology solutions, announced that Savos Personal Portfolios are now available on the AssetMark platform. Savos Personal Portfolios offer features that are usually found in high-net-worth solutions at an accessible investment minimum and can be customized to meet clients' needs and adapt as those needs change.

“We think today’s investors are looking for more personalized features and solutions that fit into their unique situations and we’re excited to offer them for a \$250,000 investment,” said Jason Thomas, Chief Executive Officer and Chief Investment Officer of Savos. “We offer portfolio comparison analysis and tax-managed transition services, making it easy for advisors to compete for this client segment and have more engaged discussions with clients about their financial goals.”

Savos Personal Portfolios enhance AssetMark’s current platform offerings, addressing a range of client investment objectives, including growth and income. “We’re continually looking for investment solutions that provide value to financial advisors and their clients, and complement our investment platform,” said Natalie Wolfsen, Chief Solutions Officer at AssetMark. “These portfolios provide personalization and quality service in an accessible and affordable manner for the aspiring affluent and affluent client.”

Savos Personal Portfolios feature strategies managed by Savos Investments. They incorporate individual stocks, yield-focused fixed income and a tactical strategy that seeks additional equity exposure when the markets are rising and reduces equity exposure to avoid large losses in downturns.

Learn more at assetmark.com/personal-portfolios

About AssetMark Financial Holdings, Inc.

AssetMark Financial Holdings, Inc. (NYSE: AMK) is a leading provider of extensive wealth management and technology solutions that power independent financial advisers and their clients. AssetMark, Inc., an investment adviser registered with the Securities and Exchange Commission, operates a platform that comprises fully integrated technology, personalized and scalable service and curated investment solutions designed to make a difference in the lives of advisers and their clients. AssetMark has \$56.1 billion in platform assets as of June 30, 2019 and a history of innovation spanning more than 20 years.

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SOURCE: AssetMark, Inc.