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AssetMark Integrates Redtail Data to Streamline Client Onboarding *New Feature Reduces Account Opening Time and Enhances Client Relationships*

CONCORD, CA — February 26, 2019 — AssetMark, Inc., a leading provider of innovative investment and consulting solutions, today announced the integration of Redtail data with its platform to simplify the client onboarding process. By allowing advisors to pull in client data directly from their Redtail accounts, the new feature will expedite the account setup process and provide a centralized hub for advisors to more easily manage existing clients.

“This integration will allow advisors to spend less time on the administrative work of opening accounts and more time on what’s important – delivering value to their clients,” said Carrie Hansen, EVP, Chief Operating Officer at AssetMark. “In everything we do, we’re looking for ways to give advisors the opportunity to do their work more efficiently and effectively.”

The integration will allow advisors to open individual or joint accounts in a fraction of the time it currently takes by directly populating client data from their Redtail CRM. In-house testing shows that the average search and import time with Redtail integration is 30 seconds, compared to about four minutes inputting the information manually. The integration will also enable advisors to store their Redtail login information so they’re automatically connected when they login to the AssetMark advisor portal. AssetMark advisors will also have access to exclusive pricing on Redtail.

The Redtail integration is part of AssetMark’s larger effort to make the client onboarding process more efficient for advisors. In 2017, the company launched [Smarter Account Setup](#), allowing advisors to open accounts faster through a guided process and by reducing paperwork and signatures required on the backend.

About AssetMark, Inc.

AssetMark, Inc., an investment adviser registered with the Securities and Exchange Commission, is a leading independent provider of innovative investment and consulting solutions serving financial advisors. The firm provides investment, relationship and practice management solutions designed to make a difference in the lives of advisors and their clients. AssetMark, Inc., including its Savos and Aris divisions, has more than \$44.8 billion in assets on its platform as of December 31, 2018, and a history of innovation spanning over 20 years. For more information, visit www.assetmark.com and follow [@AssetMark](https://twitter.com/AssetMark) on Twitter.

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