MEDIA CONTACT:
Jill Epstein, Group Gordon
jepstein@groupgordon.com
(212) 784 5698

AssetMark Unveils WealthBuilder^{SM}, a Dynamic Online Investment and Planning Experience, and Updated Investor Portal for Online Account Access

New digital solutions are designed to help financial advisors scale their businesses while positioning clients to achieve and track their personal investment goals

CONCORD, CA — November 13, 2018 — AssetMark, Inc., a leading provider of innovative investment and consulting solutions, today announced the launch of WealthBuilder, a new digital investment and planning experience designed to help financial advisors streamline and scale their businesses while helping clients plan, track, and meet their goals with customized, lower-cost portfolios. The firm also launched an entirely new, modern Investor Portal experience, providing investors with secure and streamlined online and mobile access to their accounts.

Together, WealthBuilder and the Investor Portal help advisors meet the needs of investors seeking hybrid financial advice that combines the convenience of 24-7 access to information with the assurance of working with a trusted financial advisor. WealthBuilder positions advisors to engage clients and prospects in guided, consultative conversations framed around their unique goals rather than simply discussing portfolio performance. These objectives are then reflected in the Investor Portal, delivering a customized experience where investors can view transaction history and track their personal goals through a sleek user-friendly dashboard.

"WealthBuilder empowers advisors to blend the benefits of personalized advice with the convenience of digital information for clients," said SVP of Strategic Initiatives Matt Matrisian. "WealthBuilder's straightforward approach supports advisor-client conversations about aligning a portfolio to each client's specific goals and risk tolerance, and Investor Portal complements this straightforward approach by providing investors with intuitive tools to track personal progress."

According to Gallup research, 68 percent of US investors prefer this type of multifaceted financial advice that combines advisor expertise with convenient online resources.

"These new solutions demonstrate AssetMark's ongoing commitment to providing advisors with the comprehensive suite of tools and resources they need to grow their practices, deliver value to clients, and stay competitive," said Natalie Wolfsen, EVP, Chief Solutions Officer at AssetMark.

The managed portfolios available through WealthBuilder provide globally diversified investment solutions that are consistently monitored by AssetMark's due diligence team. Moreover, the underlying investments in the WealthBuilder portfolios leverage core markets ETFs and actively-managed mutual funds to provide low-cost diversification combined with the flexibility to adjust to changing market conditions.

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 $47.5 billion in assets on its platform as of September 30, 2018 and a history of innovation spanning over 20 years. For more information, visit www.assetmark.com and follow @AssetMark on Twitter.

Important Information

AssetMark WealthBuilder reports are generated by Financial Advisors for specified investors. Reports do not represent investment advice or recommendations of securities by AssetMark, Inc. AssetMark does not verify the accuracy of the information or whether any investment solutions are appropriate. Online access is subject to system availability.

Investing involves risk, including the possible loss of principal. Past performance does not guarantee future results. 24-7 online access is subject to system availability.

For more complete information about the various investment solutions available, including the investment objectives, risks and fees, please refer to the Disclosure Brochure and applicable Fund Prospectus. Please read them carefully before investing. For a copy, please contact an AssetMark Consultant.

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