



AssetMark Launches Digital Prospecting Capability for Advisors

AssetMark WealthBuilderSM Prospecting provides a streamlined and customized experience for managing and converting leads

CONCORD, Calif. — January 24, 2022 — AssetMark, a leading provider of wealth management and technology solutions for financial advisors, today announced the launch of WealthBuilderSM Prospecting, a new tool designed to streamline prospecting for financial advisors and provide them with insights to drive lead conversion.

In about 20 minutes, WealthBuilder Prospecting enables advisors to generate a unique link to use on their websites, in emails or social posts, or in online advertising. The link is a gateway for interested leads to start a low-friction discovery process. This helps to convey where prospective clients are at in their financial journey, giving advisors an advanced look at their needs, preferences and interests.

Prospects then have the option to engage directly with advisors, who also receive an alert whenever someone completes the process—a great indicator that a lead is open to learning more. Advisors also are equipped with a dashboard that can help them organize their lead-to-prospect pipeline and keep track of the status of various engagements.

“Common prospecting methods such as cold calling, advertising or seminars often require a large investment of time and money, with no guarantee of success,” said Michael Raneri, Chief Digital Innovation Officer at AssetMark. “WealthBuilder Prospecting allows advisors to invite leads into the planning process and effectively ‘kick-start’ a warm client engagement process, in a time-efficient way that increases the chance of earning new business. We are pleased to provide advisors with another digital tool to help them build their businesses and drive client satisfaction.”

Interested advisors can find more information by viewing this [informational webinar](#) or through their AssetMark representative.

About AssetMark Financial Holdings, Inc.

AssetMark is a leading provider of extensive wealth management and technology solutions that power independent financial advisors and their clients. Through AssetMark, Inc., its investment advisor subsidiary registered with the Securities and Exchange Commission, AssetMark operates a platform that comprises fully integrated technology, personalized and scalable service and curated investment platform solutions designed to make a difference in the lives of advisors and their clients. AssetMark had \$89.8 billion in platform assets as of November 30, 2021 and has a history of innovation spanning more than 20 years.

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