

Elevate your practice with AssetMark Business Consulting

From client segmentation to succession planning, our experienced business consultants can help you stay current and build a sustainable, successful business.

Business Consulting at AssetMark

We support you and your business at every stage of growth through individualized guidance and by identifying opportunities to increase value, drive growth, and boost your firm's performance.

Guiding the way

Maximize your time, energy and resources to reduce risk and enhance your firm's overall performance. We work with you to pinpoint opportunities for improvement in these focus areas:

- Business Strategy & Planning
- Empowering Your Team
- Client Experience & Operations
- Marketing your Business

Helping you thrive

Build a more dynamic business through personal accountability from your Business Consultant and access to our robust library of curriculum and extensive resources. We meet you where you are—today—and deliver solutions every step of the way.

Growing together

We support the unique needs of your business, allowing you to focus on helping your clients achieve their financial dreams. Our individualized approach offers you what you need, when you need it, including:

- Consulting calls
- Tool and resource direction
- Best practice consulting on our curriculum concepts
- Accountability and implementation support
- Access to customizable business tools, modules and libraries

Our community fosters idea-sharing and professional networking through in-person events, workshops, and webinars. Gain access to the latest philosophy, research and guidance straight from industry experts.

We also support your growth with actionable tools that advance the performance of your business. Access a suite of resources on our proprietary online portal, eWealthManager®, to build, market, and manage your business. Utilize our strategic relationships with third-party vendors to receive discounts on services and technology. Start with our Business Assessment Tool to compare your business to peer benchmarks, track performance and identify growth opportunities.

Build your business with us in three easy steps

Step 1: Discover

We gather details about your business, team structure, services and goals; guiding you through our Business Assessment Tool.

Step 2: Analyze

Your business assessment establishes benchmarks and a valuation range for your firm, and identifies opportunities or risks using our value maximization index. We work together to create your business strategy and improvement plan, determining where to focus your efforts with key performance indicators (KPIs).

Step 3: Implement

Working with your Business Consultant, access the tools, resources and support to implement your action plan based on priorities you identified.

Supporting your vision of success

We focus our services to help you build a sustainable and successful business

Sample highlights from our comprehensive roster of available curriculum topics

Business Strategy & Planning	Empowering Your Team	Client Experience & Operations	Marketing Your Business
<ul style="list-style-type: none">• Strategic Planning• Firm Vision & Values• Succession Planning / M&A• Business Assessment Tool• Economic Modeling• Goal Planning & Tracking	<ul style="list-style-type: none">• Organizational Structure• Compensation Strategy & Incentive Plans• Job Descriptions & Career Ladders• Hiring & On-Boarding• Advisor Recruiting• Performance Management	<ul style="list-style-type: none">• Client Segmentation• Client Service Models• Client Review Process• Technology & Outsourcing Resources• Vendor Relationship Support• Fee Schedules	<ul style="list-style-type: none">• Brand & Website Improvement• Value Proposition• Marketing Plans• Referral Generation• Target Client Profile• Referral Management

Our business consulting support expands as your business grows with AssetMark¹

	New Advisors and Premier Advisors \$5 million+	Gold Advisors \$25 million+	Platinum Advisors \$75 million+
Support Team	Centralized Consultants	Specialized Consultants	Platinum Consultants
Support and Guidance	Resource direction	Resource direction Strategic and project consulting	Resource direction Strategic and project consulting Private consulting
Engagement Duration	Up to 4 months	Up to 6 months	Up to 18 months
Virtual Consulting Sessions	Up to 5 calls (one hour in length)	Monthly consulting calls (one hour in length)	Monthly consulting calls (one hour in length)
Dedicated Support²	Up to 9 hours	Up to 20 hours, including customization of tools	Up to 60 hours, including customization of tools and custom models
In-person Meetings		One half-day meeting (per 12 months)	Two half-day meetings (two per 12 months)

¹ Advisor Benefits Program status is based on net contributions, which is the dollar amount of new business brought to the platform, less withdrawals and terminations. Additional restrictions apply. Participation in the program may be subject to broker-dealer approval.

² Allotted time is approximate. Actual time may vary based on a number of factors, including your level of engagement with the program.

Ready to take your business to the next level?

Get started

Call 800-664-5345 or visit AssetMark.com

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Important Information

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Investing involves risk, including the possible loss of principal. Past performance does not guarantee future results.

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