

Service You Can Trust



Our service teams go to great lengths to support you so you can focus on what matters most – serving your clients and helping them achieve their goals.

SERVICE TAILORED TO FIT YOU

Our service teams are segmented to provide tailored service at each stage of your AssetMark journey.

During your first year receive expert hands-on guidance from our New Advisor Team:

- Dedicated Relationship Manager and Case Manager provide specialized training and servicing, opening all your client accounts and completing asset transfers to prevent delays
- Transition specialists are available to help transition large groups of client accounts

As your business grows, so does the support you receive from AssetMark:

STANDARD PC	GOLD	PLATINUM
\$5+ million	\$25+ million	\$75+ million
<ul style="list-style-type: none">• Relationship Manager, backed by our service team, supports broad-based needs and established client base• Hosts quarterly webinars to share best practices and maximize your experience	<ul style="list-style-type: none">• Relationship Manager provides deep expertise as a trusted resource• Higher priority work flow• Hosts quarterly webinars to share best practices and maximize your experience	<ul style="list-style-type: none">• Platinum Relationship Manager and Case Manager provide customized support and execute requests to your specification• Highest priority work flow• Focused on saving you time and money

Our advisors rank our service and operations support as the top reason they recommend us.*

85% of calls are
answered in 20
seconds

99.99% of all
transactions are
processed flawlessly

100% of accounts
opened within 24 hours,
most same day**

*Advisor Experience Assessment Survey Q2 2017

**For applications submitted in good order (complete and accurate)



THERE WHEN YOU NEED US

When you need something you don't want to wait, and neither do we. Our service teams are staffed Monday-Friday 8:00am-8:00pm ET and scheduled to answer calls quickly. We continually strive for improvement and a high standard of excellence, setting aggressive goals that we measure.

- Minute-by-minute tracking reports let us see call volume and pinpoint needs
- If we ever let you down, we're working immediately to find a solution to provide the best service every day
- We record every recommendation our advisors make, then prioritize and follow up on when it will be implemented



WE 'HEART' YOU

Making a difference in the lives of our clients is at the heart of everything we do. Our team is passionate about serving you and your clients because we only hire people who have an affinity for service and align their success to you.



MAKING YOU THE HERO

When you win, we win. That's why we're dedicated to helping you manage your business efficiently and asking for your opinion along the way. Our Operations Advisory Board is made up of advisors and support staff that share feedback on how we can best serve your practice, so you can spend more time being the hero to your clients.



WE'RE IN IT TOGETHER

In an industry riddled with uncertainty and delays, we have built our business on earning your trust and serving your needs. We pride ourselves on the deep relationships we have forged with thousands of advisors across the country, working together in our commitment to provide the best for our clients.

Ready to learn more about service at
AssetMark? Contact an AssetMark
Consultant 844-540-0972 ▲

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