AssetMark Advantage Meeting

ASSETMARK

Agenda

Time	Topic
7:30 – 8:30 am	**Breakfast**
8:30 – 9:30 am	**Why AssetMark?** Take a deep dive into how to work with AssetMark to reimagine your business and optimize growth. Hear from other advisors how they are using AssetMark to enhance and strengthen their business Learn about the teams AssetMark has to support you.
9:30 – 10:00 am	**Is your Investing Evolved?** AssetMark's updated approach to investing helps you build portfolios that can keep clients invested for the long-term. Learn how our due diligence professionals research and select the strategists and investment solutions that are the building blocks of our approach.
10:00 – 10:15 am	**Break**
10:15 – 11:15 am	**Leveraging Technology to Grow Your Business** Discover how AssetMark's technology and resources can help you increase efficiencies to grow your practice, build better portfolios and provide enhanced services to your clients.
11:15 – 11:45 am	**AssetMark Retirement Services** Opportunities for growth could be hidden in your existing contacts. Learn how AssetMark Retirement Services can help you tap into a new market and increase the value of your business.
11:45 am – 12:45 pm	**Lunch**
12:45 – 1:45 pm	**Engaging High Net Worth Clients** Understand how to work with high net worth clients. A panel of strategists will discuss their perspectives on the High Net Worth segment and highlight the solutions they have available on AssetMark's platform.
1:45 – 2:45 pm	**Strategist Spotlight – Dimensional Fund Advisors** A new Dimension for your clients' portfolios: AssetMark's MarketDimensions Portfolios put the financial science pioneered by Dimensional Fund Advisors into portfolios designed by AssetMark. Learn how these lower-cost, tax-efficient core market strategies can work for every stage of your clients' financial plans.
2:45 – 3:00 pm	**Wrap-Up**

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