



AssetMark Appoints Erin Wood as Senior Vice President of Advanced Planning

CONCORD, Calif., December 10, 2024 (GLOBE NEWSWIRE) – AssetMark, Inc., a leading provider of wealth management and technology solutions for financial advisors, today announced the appointment of Erin Wood, CFP®, FBS®, as Senior Vice President of Advanced Planning. In this role, Wood will spearhead the development and introduction of AssetMark’s advanced planning offering, which will focus on delivering tailored strategies for estate planning, tax efficiency, retirement planning, and multi-generational wealth transfer to support financial advisors as they address the evolving needs of investors across the wealth spectrum.

Wood joins AssetMark with over two decades of experience leading financial planning teams and building innovative solutions across a range of disciplines, including trust and estate, tax planning, insurance, and retirement services. She previously held senior leadership positions at the Carson Group and First National Bank of Omaha, where she developed and scaled advanced planning capabilities and helped advisors deliver those services to clients.

"Erin brings unparalleled expertise and a deep commitment to empowering advisors to succeed in an increasingly complex financial planning landscape that extends beyond traditional investment management to include advanced planning strategies," said David McNatt, EVP, Investment Solutions at AssetMark. "Her track record of innovation and leadership makes her the ideal person to build and lead AssetMark’s advanced planning services, addressing the growing need for comprehensive, integrated financial strategies for high-net-worth individuals and families. Erin will be instrumental in helping AssetMark advisors access the tools and resources they need to provide tailored, holistic wealth planning solutions, ultimately delivering enhanced value to their clients, and enabling advisors to better meet their clients’ evolving needs."

Wood’s responsibilities include driving the vision for AssetMark’s advanced planning services, identifying and establishing strategic relationships, and serving as a thought leader in the industry. Her insights will play a pivotal role in equipping advisors with the tools and strategies needed to meet the growing demand for holistic wealth management services.

Commenting on her new role, Wood stated, "I am thrilled to join AssetMark and lead the charge in delivering best-in-class advanced planning services to our advisors and their clients. Financial planning is about empowering individuals and families to achieve their goals, and I look forward to building solutions that make a meaningful impact on their lives."

A nationally recognized speaker and contributor to leading publications such as *Kiplinger*, *TheStreet*, and *HerMoney* among others, Wood is passionate about financial literacy, particularly for women, and fostering advisor success through education and innovation. She has been honored with the Wealthies 2023 Thought Leader of the Year award and the InvestmentNews 2024 Women to Watch – Financial Literacy Champion Excellence Award for her outstanding contributions to the industry. Wood holds a B.S. in Finance and Communications from Northwest Missouri State University and a graduate degree in Financial Psychology and Behavioral Finance from Creighton University.

About AssetMark

AssetMark operates a wealth management platform whose mission is to help financial advisors and their clients. AssetMark, together with its affiliates AssetMark Trust Company, Voyant, and Adhesion Wealth Advisor Solutions, serves advisors at every stage of their journey with flexible, purpose-built solutions that champion client engagement and drive efficiency. Its ecosystem of solutions equips advisors with services and capabilities to help deliver better investor outcomes by enhancing their productivity, profitability, and client satisfaction.

With a history going back to 1996, AssetMark has over 1,000 employees, and its platform serves over 9,000 financial advisors and over 263,000 investor households. As of September 30, 2024, the Company had over \$127 billion in platform assets. AssetMark, Inc. is a Registered Investment Adviser with the U.S. Securities and Exchange Commission. For more information, please visit www.assetmark.com. Follow us on [LinkedIn](#).

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