



Matt Matrisian

HEAD OF CLIENT GROWTH

ASSETMARK

WELCOME TO PALMETTO BLUFF



ASSETMARK PLATINUM

OUR MISSION



LEADERSHIP



INSIGHTS



CELEBRATION

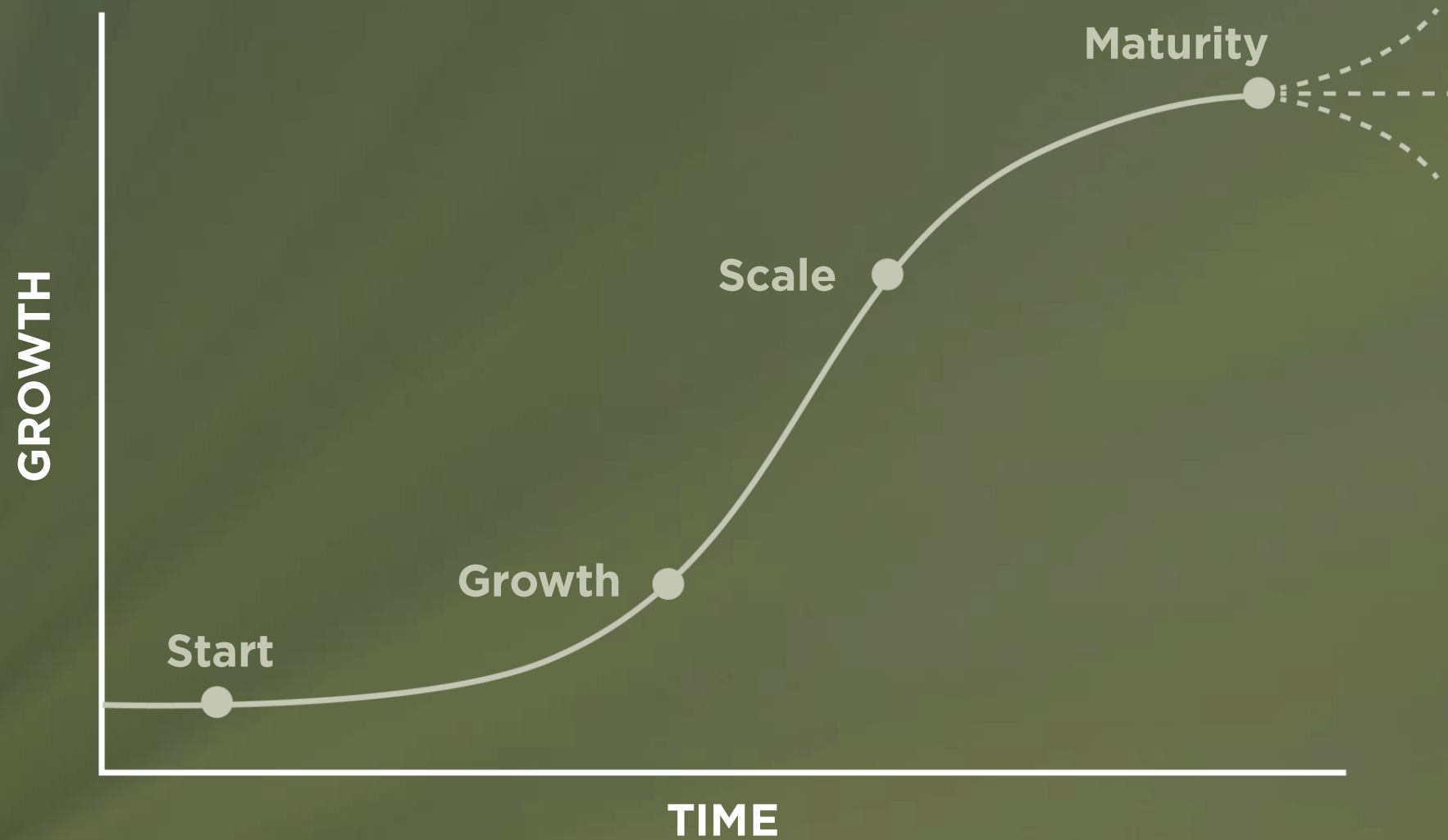


BOLD INNOVATION

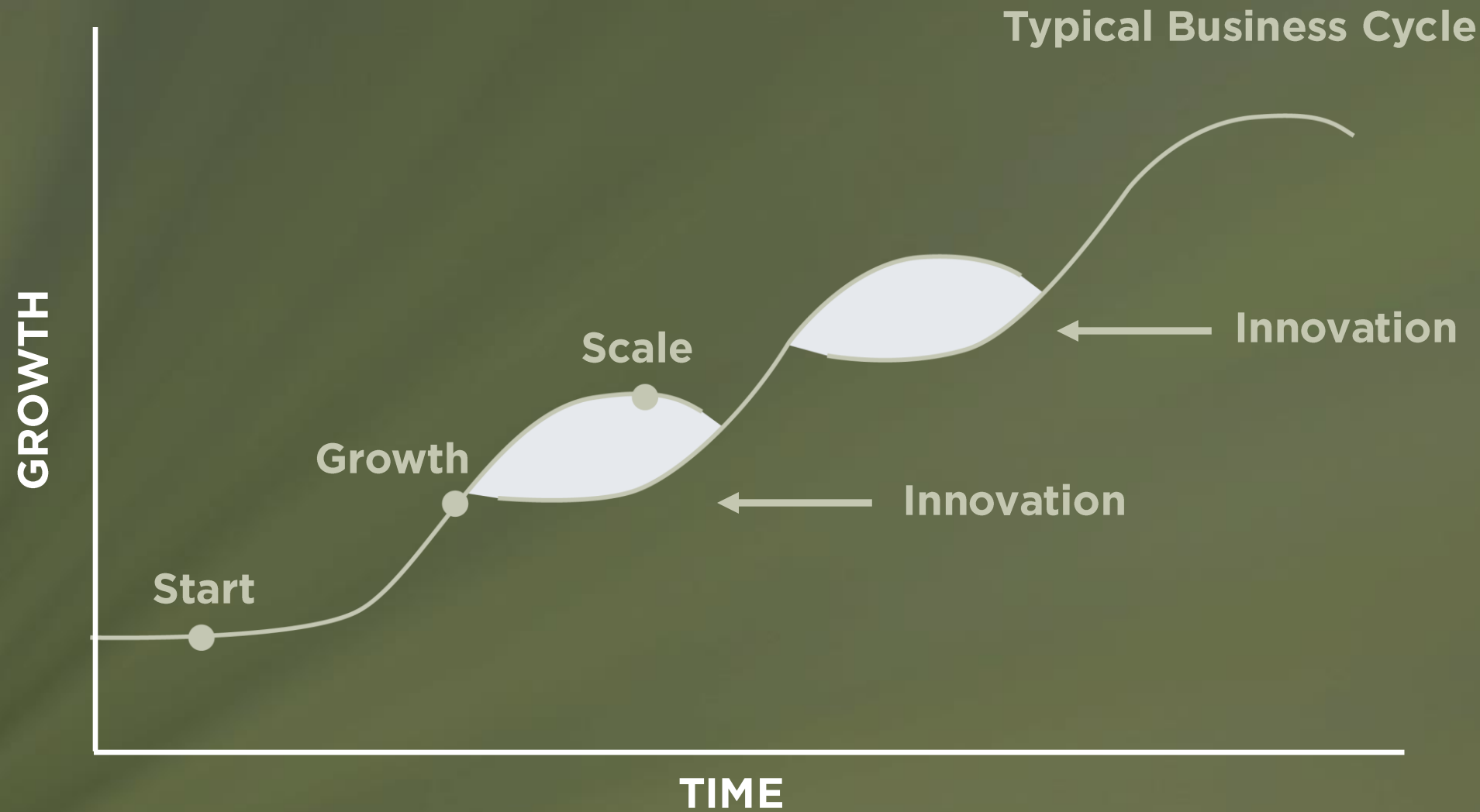
Innovation, the key to progress, embodies our boundless ingenuity and relentless pursuit of improvement. It serves as both a compass and catalyst, propelling us forward by transcending limitations, reimagining the status quo, and fostering resilience in the face of challenges. Boldness and innovation got us here, and it will drive our future.

Beyond technological advancement, innovation fuels economic growth and nurtures entrepreneurship; it stands as a testament to our potential, enriching lives, shaping history, and charting the course of a brighter, more dynamic future. History belongs to the innovators.

S-Curve: The Entrepreneurial Business Cycle



Innovation Drives Sustainable Growth



Platinum and Elite = Hyper-growth

5 - Year AUM CAGR

25.10%

Average Net Organic Growth

16%

AUM GROWTH (in Billions)



THE IMPACT YOU BRING

17

AVERAGE
YEARS OF
TENURE

\$153M

AVERAGE AUM
PER ADVISOR

The background of the image is a dark green, textured pattern resembling the fronds of a palm tree, radiating from the bottom center. The text "PLATINUM" is written in a large, bold, white, sans-serif font, centered horizontally. Below it, the word "SUMMIT" is written in a smaller, white, sans-serif font, also centered horizontally.

PLATINUM

SUMMIT