

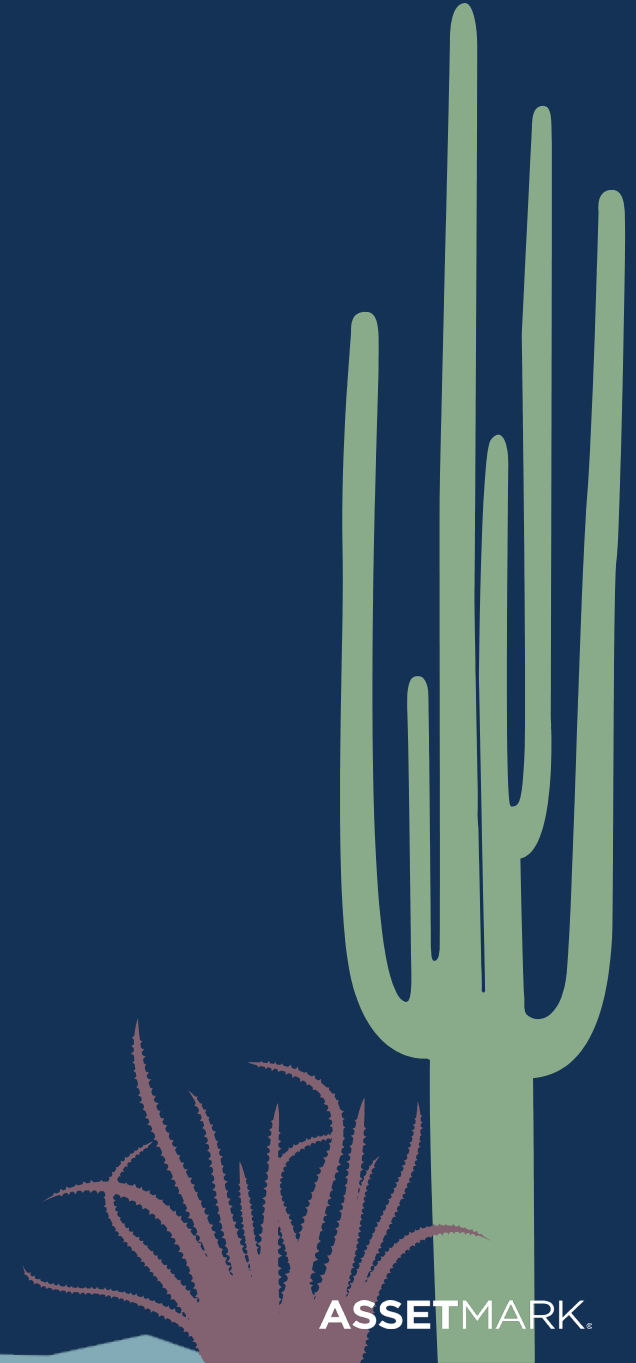


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# Business Owners – Differentiating Your Offering

Rico Casares



# FUN STATS

- How many small businesses in the U.S. as of 2020?
- What percentage of all U.S. businesses are small businesses?
- What is the number one reason why people start their own business?
- What percentage of businesses survive one year? Five years? Ten years?
- How many businesses open each year?



# TABLE DISCUSSION TOPICS

- Qualifications (i.e. Designations, Experience)
- Value Prop
- Business Owner Service Model
- AssetMark's Strategic Relationships (i.e. BizEquity, Voyant)
- Investment Strategies for Business Owners



# IMPORTANT INFORMATION

This is for informational purposes only, is not a solicitation, and should not be considered investment, legal, or tax advice. The information has been drawn from sources believed to be reliable, but its accuracy is not guaranteed, and is subject to change.

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

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