



GOLDFORUM
LIMITLESS



Tech-Forward Advisor – Propelling Your Firm with Technology

Facilitator: Brian Posner, supported by Kristi Toland

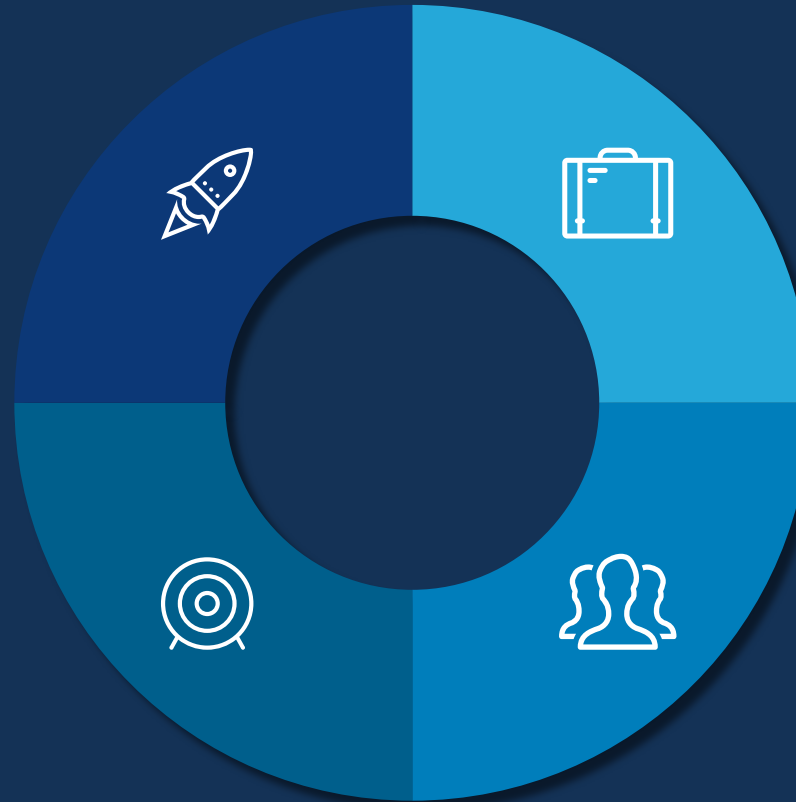
Supporting your Firm's Vision of Success

Marketing Your Business

- Value Proposition
- Target Client Profile
- Marketing Plan
- Referral Management
- Center of Influence Process

Client Experience & Operations

- Segmentation
- Client Services Checklist
- Sample Service Model
- Client Opportunity Review
- Technology Self Assessment
- Technology & Outsourcing Resources



Business Strategy & Planning

- Business Assessment Tool
- Economic Modeling
- Creating a Powerful Strategic Plan
- Value Maximization Plan
- Goal Planning
- Monitoring & Tracking Progress

Empowering Your Team

- Sample Compensation Plan
- Compensation Strategy and Structure
- Sample Job Descriptions
- Career Ladders
- Performance Reviews
- Hiring and On-Boarding

Evolution of firm value



Factors Clients Value Most in Advisors



73%

Transparency



67%

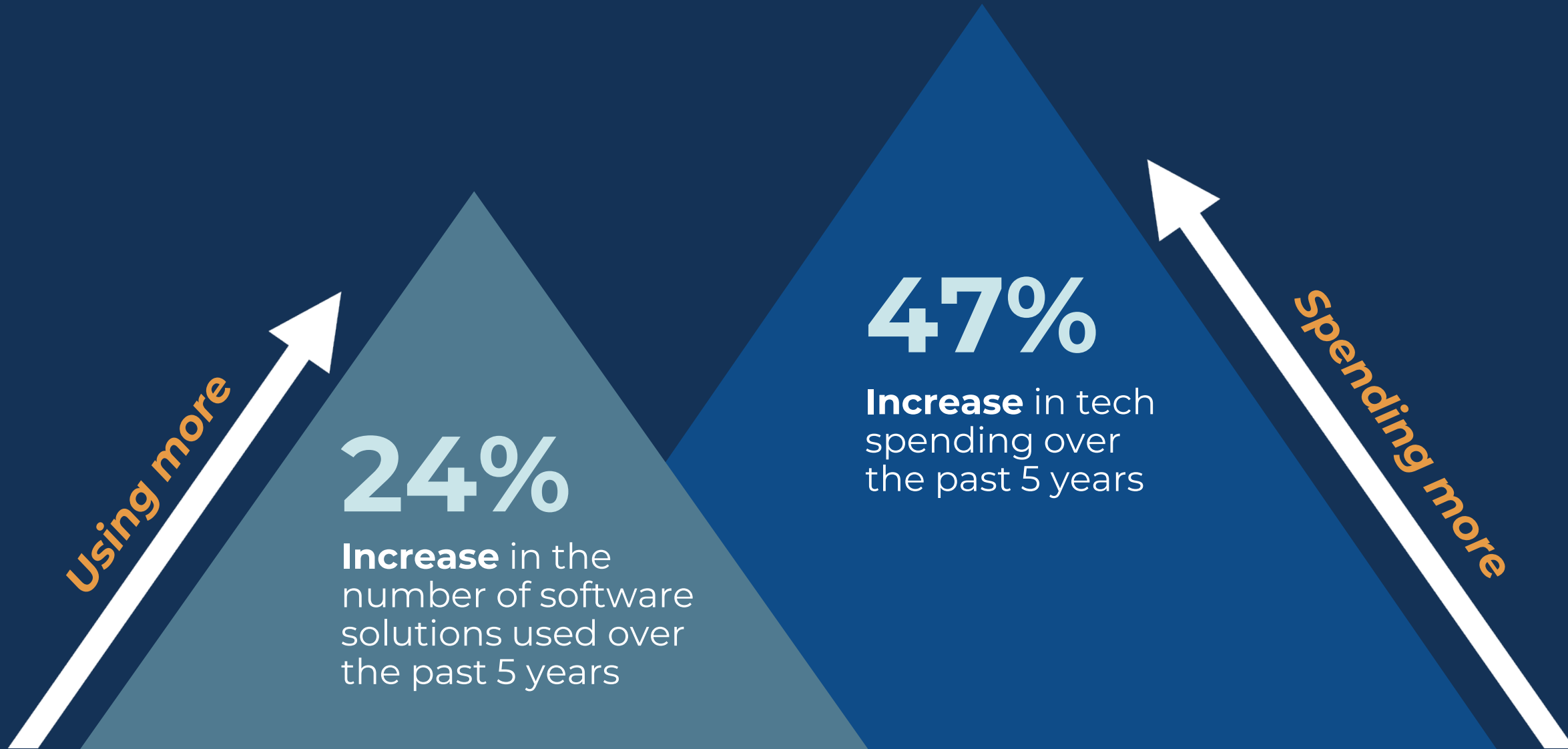
Understanding
Needs & Goals



59%

Portfolio Monitoring
& Communication

With Technology, Advisors are...





Technology is Key to a Holistic Client Experience

33%

of investors say digital tools help **them** better engage and understand investing



61%

of investors prefer hybrid **investment** advice (through a human & digital model)



51%

of investors would switch to an **advisor** with better or easier access to their account



AssetMark's Strategic Relationships





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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