

AssetMark Honors Financial Advisors with Community Inspiration Award

AssetMark donates \$60,000 in support of six financial advisors' outstanding commitment to local charities.

CONCORD, Calif., April 1, 2024 (GLOBE NEWSWIRE) — AssetMark, Inc., a leading wealth management platform for financial advisors, announced the recipients of its 2024 Community Inspiration Award at the firm's premier Gold Forum conference in Orlando, Florida. The annual Community Inspiration Award honors advisors who are making a significant impact in their communities through dedicated service, by awarding \$10,000 to each advisor's charitable organization.

This year's honored advisors and their respective charitable organizations that will receive the donations include:

- [Leo Daprile](#), Gem-Young Wealth Advisors, LLC
 - [Mercy Health Foundation Mahoning Valley](#)
- [Beth Jones](#), Third Eye Associates, Ltd
 - [Working for Women, Inc.](#)
- [Laura Leavitt](#), LeAlta Financial Group
 - [Hearts and Minds Activity Center](#)
- [Maggie Roche](#), Roche Financial, Inc.
 - [UPMC Hillman Cancer Center](#)
- [David Shoher](#), Osaic Wealth, Inc.
 - [Aquilino Cancer Center](#)
- [Kit J. Tiell](#), Tiell Financial Group
 - [Tiffin University](#) KJT Scholarship

"We are excited to honor the incredible passion and commitment of these financial advisors who go above and beyond to create a positive impact in the lives of others," said Michael Kim, CEO and President of AssetMark. "Their dedication to their communities is inspiring and we are proud to be part of an industry so committed to giving back."

Award recipients were selected by a panel of senior executives at AssetMark. Nominees were evaluated on their ability to inspire, lead, and motivate others, in addition to the time and effort they dedicated to their local charity. All nonprofit recipients are qualified 501(c)(3) organizations.

About AssetMark Financial Holdings, Inc.

AssetMark operates a wealth management platform that powers independent financial advisors and their clients. Together with our affiliates Voyant and Adhesion Wealth, we serve advisors of all models at every stage of their journey with flexible, purpose-built solutions that champion client engagement and drive efficiency. Our ecosystem of solutions equips advisors with services and capabilities that would otherwise require significant investments of time and money, ultimately enabling them to deliver better investor outcomes and enhance their productivity, profitability, and client satisfaction.

Founded in 1996 and based in Concord, California, the company has 1,000 employees. Today, the AssetMark platform serves over 9,300 financial advisors and over 254,000 investor households. As of December 31, 2023, the company had \$108.9 billion in platform assets.

Contacts

Alaina Kleinman
Head of PR & Communications
alaina.kleinman@assetmark.com

SOURCE: AssetMark Financial Holdings, Inc.