



## **AssetMark Launches Advisor Dashboard, First Step in Broader Digital Ecosystem Enhancements**

*The new eWealthManager® homepage aims to help advisors manage their businesses more efficiently*

CONCORD, Calif., March 4, 2024 -- AssetMark, a leading provider of wealth management solutions powering independent financial advisors and their clients, today announced the launch of its Advisor Dashboard, the new central hub of AssetMark's digital platform. Designed to deliver real-time client and business insights, the Advisor Dashboard enhances efficiencies for advisors and streamlines their workflows.

"At AssetMark, we are committed to empowering advisors with the technology they need to thrive," said Esi Minta-Jacobs, EVP, Head of HR & Digital Product Solutions for AssetMark. "The Advisor Dashboard marks a significant step forward in our ongoing mission to modernize our tech stack and create a faster, more flexible, and intuitive user experience for advisors. This enhanced platform will equip them to confidently guide their clients through their financial journeys."

The Advisor Dashboard serves as the new homepage of AssetMark's advisor platform, offering a comprehensive view of key performance indicators across clients, accounts, and businesses. Advisors can tailor their dashboards to their specific needs using drag-and-drop tiles, displaying vital information like total assets under management, client lists, and account details.

The Advisor Dashboard acts as a launchpad to all of AssetMark's digital capabilities, empowering advisors with the data, tools, and technology they need to engage clients, deliver expert financial guidance, and manage their businesses efficiently.

Advisors can create up to five custom dashboards for different activities, each with its own set of customizable tiles. This personalized approach ensures advisors have the information they need at their fingertips, maximizing efficiency and productivity.

To learn more about the Advisor Dashboard, visit [www.assetmark.com](http://www.assetmark.com) or join AssetMark's upcoming webinar, "[Empower Your Growth: Unlock the Power of the Advisor Dashboard](#)," on Thursday, March 7 at 4:00 pm ET for a live dashboard walkthrough and Q&A session.

### **About AssetMark**

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 nearly 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.

Media:

Alaina Kleinman

Head of PR & Communications

[alaina.kleinman@assetmark.com](mailto:alaina.kleinman@assetmark.com)