

AssetMark Launches Values-Driven Investment Program, Announces Inaugural ESG Report

CONCORD, Calif. — April 25, 2022 — AssetMark, a leading provider of wealth management and technology solutions for financial advisors, today underscored its commitment to corporate social responsibility in announcing the launch of a Values-Driven Investing program, as well as the release of its inaugural ESG Report.

“We have long been dedicated to having a positive impact – in the lives of our advisors and their clients, in the communities in which we live and work, and in the world more broadly,” said AssetMark CEO Natalie Wolfsen. “I’m proud of the progress AssetMark is making in its commitment to transparency and responsible corporate citizenship, as well as enabling our advisors to meet the growing demand for ESG-focused investment strategies.”

According to estimates by Bloomberg Intelligence¹, assets in ESG-related investments are projected to grow over 40% to \$50 trillion by 2025. AssetMark’s newly introduced values-driven investment solutions give advisors the ability to align their clients’ portfolios with their personal values consistent with their overall financial goals. The first set of strategies launching on the AssetMark platform include:

- BlackRock Target Allocation ESG Models
- Nuveen ESG Growth Model Portfolios
- Brown Advisory Large-Cap Sustainable Growth
- AllianceBernstein Sustainable Global Thematic ADR Portfolio

In addition to the four strategies, advisors will have access to a robust suite of resources to support their experience including client discovery tools, due diligence resources, ESG/impact reporting, and educational materials.

“Increasingly investors are seeking to align their investments to reflect their values and the way they live,” said AssetMark Executive Vice President of Investment Solutions David McNatt. “Our Values-Driven Investing program will support financial advisors in meeting the personalized investment needs of their clients, deepening relationships in a meaningful way. We are excited to help advisors differentiate and position their practices with this fast-growing client segment focused on investing prudently while driving positive societal outcomes.”

In conjunction with the launch of AssetMark’s Values-Driven Investing program, the company also released its first ESG Report. Prepared in accordance with the accounting standards published by the Sustainability Accounting Standards Board, the report highlights the company’s current sustainability initiatives, practices, and objectives.

“Our ESG strategy is vital to how we operate and directly linked to our ability to generate long-term value for our team members, our advisors and their clients, and our shareholders,” said Wolfsen.

¹ <https://www.bloomberg.com/news/articles/2022-02-03/esg-by-the-numbers-sustainable-investing-set-records-in-2021>



The full report can be viewed [here](#).

About AssetMark Financial Holdings, Inc.

AssetMark is a leading provider of extensive wealth management and technology solutions that power independent financial advisors and their clients. Through AssetMark, Inc., its investment advisor subsidiary registered with the Securities and Exchange Commission, AssetMark operates a platform that comprises fully integrated technology, personalized and scalable service and curated investment platform solutions designed to make a difference in the lives of advisors and their clients. AssetMark had \$93.5 billion in platform assets as of December 31, 2021, and has a history of innovation spanning more than 20 years.

Media Contact:

Alaina Kleinman

Director, Communications & Public Relations, AssetMark, Inc.

alaina.kleinman@assetmark.com