



## AssetMark Launches First Trust Investment Strategies for Financial Advisors

*Three new strategies added to AssetMark platform better help advisors serve their clients*

Concord, Calif. — May 11, 2023 — [AssetMark](#) (NYSE: AMK), a leading provider of wealth management and technology solutions for financial advisors, today announced the addition of First Trust, one of the industry's largest actively managed exchange-traded fund (ETF) providers and innovators, to its platform.

“First Trust is known for providing trusted investment products and advisory services as well as for their focus on the needs of financial professionals and their clients,” said David McNatt, EVP of Investment Solutions for AssetMark. “The addition of First Trust to AssetMark’s platform of solutions is another proof point in our ongoing journey to provide advisors access to innovative products and service to help them best serve the evolving needs of their clients.”

AssetMark adds three First Trust strategies to the platform that span the investment spectrum from core to satellite, including:

- **First Trust Strategic Risk Core Portfolios:** Strategy unique to AssetMark that aims to generate consistently higher risk-adjusted performance, allocating across traditional, alternative, and buffered ETF strategies.
- **First Trust Diversified Low Duration Fixed Income:** Seeks to generate income above low duration core bonds by allocating globally across sectors.
- **First Trust Alternatives:** Seeks returns that are differentiated from traditional markets by allocating across managed futures, hedged equity, currency, opportunistic fixed income, and inflation-protected securities.

“At First Trust, we recognize the enormous value that financial advisors provide to their clients, especially during periods of economic turbulence and uncertainty,” said Ryan Issakainen, CFA, ETF Strategist for First Trust Advisors. “The strategies now available on the AssetMark platform provide a simple and efficient way for advisors to tap into First Trust’s best intellectual capital and unique, innovative ETFs, as they develop long-term strategies to help their clients reach their financial goals.”

### **About AssetMark Financial Holdings, Inc.**

AssetMark is 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 approximately 1,000 employees. Today, the AssetMark platform serves 9,300 financial advisors and roughly 244,000 investor households. As of March 31, 2023, the company had \$96.2 billion in platform assets.

### **About First Trust**

First Trust is a federally registered investment advisor and serves as the fund's investment advisor. First Trust and its affiliate First Trust Portfolios L.P. ("FTP"), a FINRA registered broker-dealer, are privately held companies that provide a variety of investment services. First Trust has collective assets under management or supervision of approximately \$195.8 billion as of March 31, 2023 through unit investment trusts, exchange-traded funds, closed-end funds, mutual funds and separate managed accounts. First Trust is the supervisor of the First Trust unit investment trusts, while FTP is the sponsor. FTP is also a distributor of mutual fund shares and exchange-traded fund creation units. First Trust and FTP are based in Wheaton, Illinois. For more information, visit [www.ftportfolios.com](http://www.ftportfolios.com).

### **Media Contact:**

Alaina Kleinman

Director, Communications & Public Relations, AssetMark, Inc.

[Alaina.Kleinman@assetmark.com](mailto:Alaina.Kleinman@assetmark.com)

SOURCE: AssetMark Financial, Inc.