



AssetMark Adds TIFIN AI Capabilities to Enhance and Scale its Industry-Leading Wealth Management Platform

TIFIN Sage's AI-driven Technology Empowers AssetMark to Deliver Highly Personalized Solutions for Financial Advisors

Boulder, Colo., and Concord, Calif., Nov 21, 2024 – TIFIN Sage, an advanced AI-powered investment platform and a division of TIFIN, is pleased to announce an expanded collaboration with AssetMark, a leading provider of wealth management and technology solutions for financial advisors. AssetMark will incorporate TIFIN Sage's cutting-edge AI capabilities into its wealth management platform through its investment consulting services, enabling AssetMark to streamline high-touch, personalized engagements. Through the integration of TIFIN Sage's AI capabilities, AssetMark aims to enable its investment consultants to rapidly gather insights, align advisory firm inputs, and deliver tailored model portfolios for an advisor's practice with greater efficiency.

This increased scalability not only meets the rising demand within AssetMark's advisor network for individualized investment services but also empowers the organization to engage with incremental firms while preserving AssetMark's exceptional service quality.

"We are excited to partner with AssetMark, a leader in wealth management, to integrate TIFIN Sage's advanced AI-powered platform into its consulting process," said Brooke Juniper, Chief Executive Officer of TIFIN Sage. "This partnership enables AssetMark to scale its comprehensive, high-touch portfolio construction services, equipping advisors to refine the client experience and deliver enhanced wealth outcomes."

David McNatt, EVP of Investment Solutions at AssetMark, commented, "The collaboration with TIFIN Sage is another step in our transformative journey to integrate AI-driven insights directly into our platform. Our relationship with TIFIN Sage will enable our consulting team to engage additional clients while strengthening the quality of support we provide. TIFIN Sage's AI technology helps us empower more advisor practices and drive client outcomes in a rapidly evolving wealth management landscape."

Building on AssetMark's successful collaboration with TIFIN Give (another TIFIN subsidiary), this agreement reinforces a shared commitment to driving innovation and delivering impactful

wealth solutions that elevate outcomes for advisors and their clients. [The AssetMark and TIFIN GIVE relationship](#) has empowered financial advisors and their clients with a modern donor-advised fund (DAF) solution, designed to streamline charitable giving and enhance the impact of philanthropic and tax planning efforts.

About TIFIN Sage

TIFIN Sage is an advanced AI-powered investment platform that utilizes state-of-the-art technology to empower financial advisors and home office professionals, enhancing the client experience with personalized, efficient portfolio construction and management. As part of TIFIN, Sage is dedicated to strengthening the advisor-client relationship through intelligent, conversational AI solutions.

About AssetMark

AssetMark operates a wealth management platform whose mission is to help financial advisors and their clients. AssetMark, together with its affiliates AssetMark Trust Company, Voyant, and Adhesion Wealth Advisor Solutions, serves advisors at every stage of their journey with flexible, purpose-built solutions that champion client engagement and drive efficiency. Its ecosystem of solutions equips advisors with services and capabilities to help deliver better investor outcomes by enhancing their productivity, profitability, and client satisfaction.

With a history going back to 1996, AssetMark has over 1,000 employees, and its platform serves over 9,000 financial advisors and over 263,000 investor households. As of September 30, 2024, the Company had over \$127 billion in platform assets. AssetMark, Inc. is a Registered Investment Adviser with the U.S. Securities and Exchange Commission. For more information, please visit www.assetmark.com. Follow us on [LinkedIn](#).

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