



AssetMark Named Winner of the ThinkAdvisor 2024 Luminaries Award for Innovation for Its Tax Management Services

CONCORD, Calif., December 17, 2024 (GLOBE NEWSWIRE) – AssetMark, Inc., a leading provider of wealth management and technology solutions for financial advisors, today announced that it has been named Winner of the ThinkAdvisor 2024 Luminaries Award for Innovation in the Business Development segment for its Tax Management Services (TMS). Now in its fourth year, the ThinkAdvisor Luminaries Awards redefine excellence in financial services, shining a spotlight on outstanding contributions from both organizations and individuals.

AssetMark’s Tax Management Services was developed to help financial advisors enhance their clients' investment outcomes by managing taxes more effectively. The solution combines advanced technology with sophisticated strategies to create personalized tax management approaches, enabling advisors with the tools and services needed to reduce investor tax liabilities and increase after-tax returns. This comprehensive offering supports advisors in providing a holistic wealth management experience, offering a clear competitive edge in the industry.

“We’re honored to receive this prestigious award from ThinkAdvisor,” said David McNatt, Executive Vice President of Investment Solutions at AssetMark. “This recognition underscores the hard work and dedication of our team in delivering innovative solutions that help advisors better serve their clients. Our Tax Management Services are a perfect example of how we continue to build products that address real-world challenges in a complex financial landscape. We’re excited to be at the forefront of transforming and personalizing the way tax management is approached in wealth management.”

By setting a new standard for recognition based on remarkable achievements and innovation, the ThinkAdvisor 2024 Luminaries Awards program inspires the industry to reach greater heights of leadership, creativity, and community engagement. A panel of independent judges made up of distinguished industry professionals determined the 2024 winners, who were recognized at an awards ceremony at the Fontainebleau Las Vegas on December 11th.

“The 2024 Luminaries Awards continue to push the boundaries of what excellence means in the financial services industry,” said Janet Levaux, editor-in-chief of ThinkAdvisor. “This year’s winners have not only demonstrated exceptional leadership and innovation but have also shown a deep commitment to making a positive impact on their communities and the industry at large. Their contributions are a testament to the dynamic and evolving nature of our business, and we are proud to highlight their achievements as examples for others to follow.”

As part of its continued commitment to supporting its advisors, AssetMark is looking ahead to 2025 with a strong focus on empowering them to meet the evolving needs of their clients. This includes the upcoming development and introduction of its advanced planning offering. The new initiative will deliver tailored strategies for estate planning, tax efficiency, retirement planning, and multi-generational wealth transfer. These solutions will help financial advisors deepen client relationships and provide comprehensive, future-focused financial strategies.

“Winning the ThinkAdvisor 2024 Luminaries Award for Innovation is a testament to AssetMark’s dedication to creating cutting-edge solutions for financial advisors,” added David McNatt. “As we look to the future, the introduction of our advanced planning offering will further strengthen our commitment to helping advisors navigate the complexities of wealth management and provide their clients with a well-rounded, integrated approach to financial success.”

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](#).

About ThinkAdvisor

ThinkAdvisor (ThinkAdvisor.com) provides financial advisors, registered investment advisors, and wealth managers with comprehensive coverage of the products, services, and information they need to guide their clients in making critical wealth, health, and life decisions. The website showcases advisors adapting and succeeding in new ways, translating the impact of industry regulation, dealmaking, and technology into digestible coverage, so advisors have more time to spend advising clients and running their businesses.

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