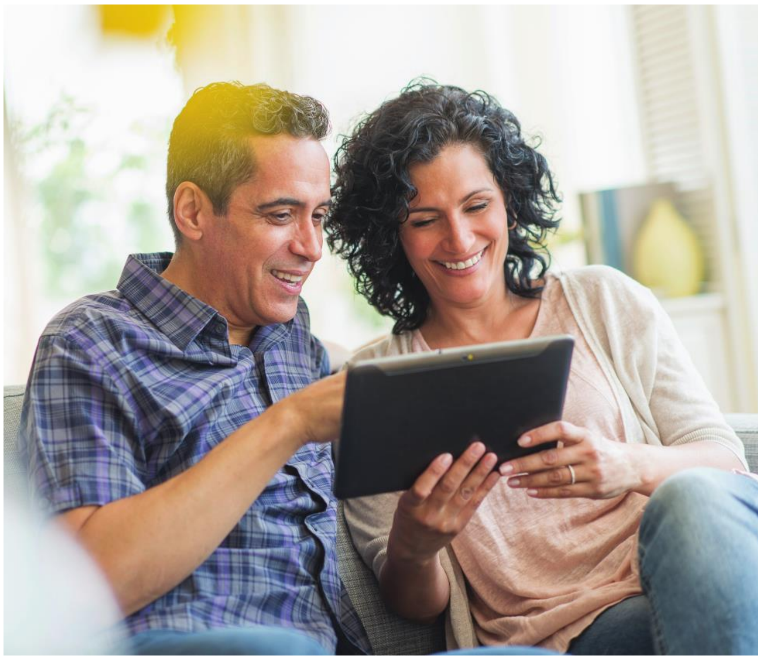
ASSETMARK
WealthBuilder℠

Get On Track.
Stay On Track.

AssetMark WealthBuilder blends the benefits of personalized guidance from a trusted advisor with an online investing and planning experience.

Whether saving for a home, planning for college, or funding your retirement, WealthBuilder can help you achieve your financial goals. Working together, you can review your objectives, plan your investments and stay current with your progress.



Get on track

WealthBuilder delivers you goal planning and an investment risk profile without having to set up a username or password, or share personal or sensitive information.

Keep more of your money working

Because WealthBuilder Portfolios are crafted from low-fee, low-minimum investments, you can keep more of your assets working towards your objectives.

Stay on track

You have 24/7, online access to monitor your investments to stay on track in pursuit of your unique goals.*

*Online access subject to system availability.

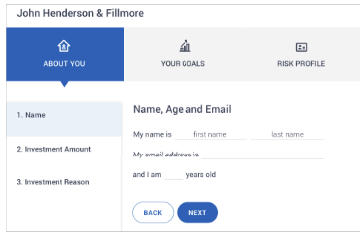
It all starts with you and your goals

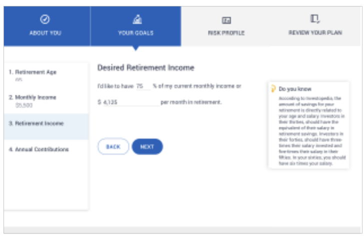
Begin your investment journey with a discovery process centered around you. Whether you complete these steps completely online or by filling out a paper form, this process always will cover four simple steps:

1

Tell Us About You

Answer a few simple questions.





Determine Your Goals

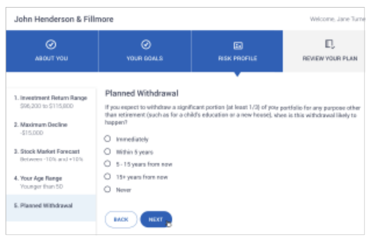
Share your goals so that we have the information to design the right plan for you.

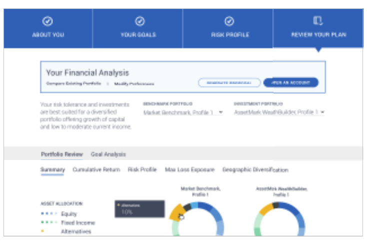
2

3

Understand Your Risk Profile

Your tolerance for risk is an important factor in your investment plan.





Review Your Plan

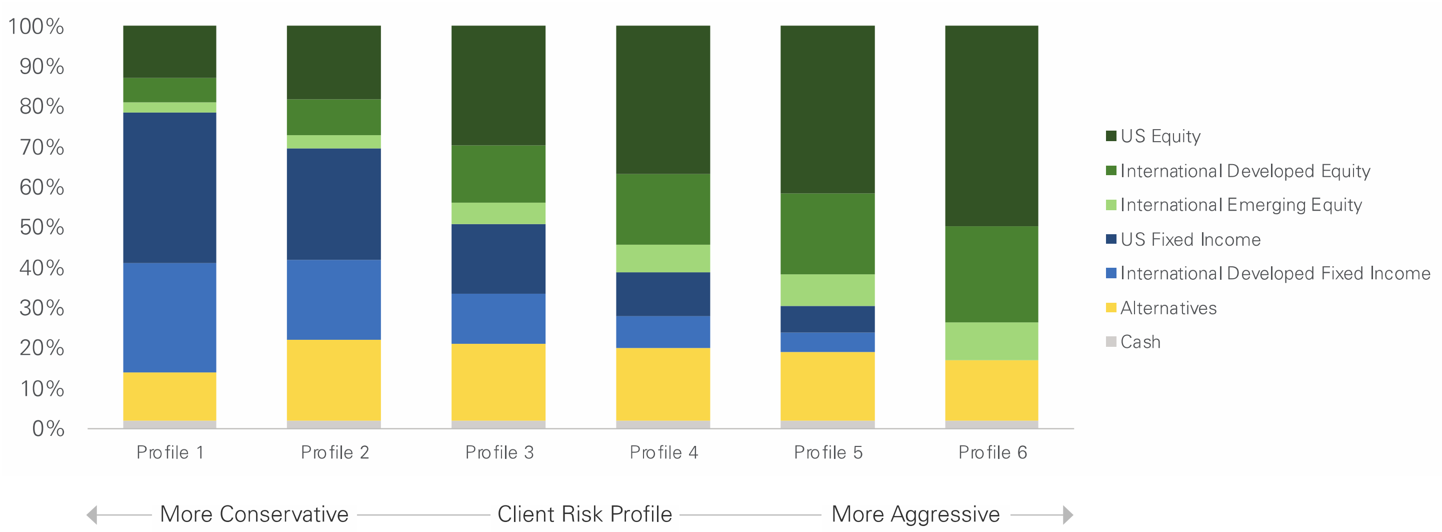
We'll review your plan, so you'll better understand how your assets will be invested.

4

A step toward your ultimate solution

WealthBuilder generates one of six investment profiles aligned with one of six WealthBuilder Portfolio solutions based on the risk/return characteristics aligned with your responses.

WealthBuilder Portfolios



Just the beginning

You are not limited to WealthBuilder Portfolios. Depending on your profile and other factors, your advisor may recommend investing in other markets solutions, from:

- AssetMark Investment Management
- American Funds
- BlackRock
- JP Morgan
- High-net-worth managers
- And more

Know where you are at and where you are headed

One of the most powerful features of WealthBuilder is the ability go online 24/7 and monitor your progress towards your goal.

Knowing your portfolio is on track can help you avoid common investor mistakes like cashing out of your portfolio following a market drop or losing faith in your investments during periods of volatility.

Face your future with confidence.

Get on track and stay on track with AssetMark WealthBuilder.

Planning for Good
WEALTH STRATEGIES WITH HEART™

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Investing involves risk, including the possible loss of principal. Past performance does not guarantee future results. Asset allocation alone cannot eliminate the risk of fluctuating prices and uncertain returns. There is no guarantee that a diversified portfolio will outperform a non-diversified portfolio. No investment strategy, such as asset allocation, can guarantee a profit or protect against loss. Actual client results will vary based on investment selection, timing, market conditions, and tax situation. It is not possible to invest directly in an index.

For more complete information about the various investment solutions available, including the investment objectives, risks and fees, please refer to the Disclosure Brochure and applicable Fund Prospectus. Please read them carefully before investing. For a copy, please contact AssetMark or Financial Advisor.

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