

AssetMark Trust Company

AssetMark Trust Company has provided independent advisors and their clients custodial and recordkeeping services since 1994. Your account is backed with the financial strength and security measures you need and the features you want, delivered with the personalized customer service you've come to expect from AssetMark.

Accounts at AssetMark Trust offer more than security, their features include:



Financial flexibility with cash management solutions

- Our Insured Cash Deposit program offers ten times the standard FDIC limit, up to \$2.5 million. Insured Cash Deposit uses a multi-bank approach that offers liquidity and competitive interest rates.
- Cash Advantage Checking* is a full-featured account with mobile access, bill pay and free worldwide ATM access.
- Cash Advantage Lending* is a line of credit backed by your account, giving you the liquidity you need, without disturbing your investment portfolio.



Streamlined Recordkeeping

- Our easy-to-understand quarterly statements keep you and your advisor up-to-date. Timely tax reporting, and online request signing help streamline your experience.
- Electronic statement delivery is available for nearly all documents, reducing paper and simplifying your recordkeeping.



Financial Strength and Security

- AssetMark Trust maintains a financial institution bond, commercial insurance coverage, and other protections against loss. Risk management best practices along with internal and external controls and audits mean your accounts have ongoing oversight.
- Our information security program and ever-evolving cybersecurity measures are designed to keep your assets safe.



Our Experienced Team

- Our team of experienced professionals will help make your account opening a smooth and seamless transition.
- They've specialized in onboarding and serving clients with unique financial situations since 1994.



20+
years of experience

85,000
clients

\$24B
assets in custody
as of June 30, 2017

For more information, contact your financial advisor ▲

**AssetMark Trust
Company**

3200 N. Central Ave.
7th Floor
Phoenix, AZ 85012

AssetMark Trust Company is an Arizona licensed trust company regulated by the Arizona Department of Financial Institutions. ©2017 AssetMark Trust Company. All rights reserved.

C32335 | 07/2017 | EXP 12/31/18