ASSETMARK ASCENT
ADVANCE

Build Your Leadership Qualifications

Guidance, hands-on training, and strategies for firm leadership

Accelerate Your Journey from Advisor to Strategic Leader

Stepping into leadership is your chance to shape your firm's future and create a legacy. AssetMark's Advance course empowers experienced advisors like you with the essential skills and strategic insights to excel in a leadership role.

Whether you're expanding your responsibilities within your organization or preparing for ownership, we'll help you lead with confidence and build a thriving practice.

ADVANCE: For the Future Leader

In-Person Retreat

Attend a comprehensive, two-day workshop that delivers fundamental insights:

- Understanding Entrepreneurship and tools for Strategic Leaders
- Business Planning including mission, vision, values and goals
- Financial and Risk Management
- Leadership and Team Management

Webinars & Consulting

Utilize your knowledge and the provided advice to execute your plans effectively:

- Delegation and time management for business owners
- Building a brand and identity
- Client Experience
- Personalized consulting tailor to your business needs

Benefits

Gain valuable insights and get a competitive edge:

- Learn firm management and strategic sales techniques.
- Build a supportive network of like-minded professionals.
- Attain the skills to lead and grow your firm into the future

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Who Should Join?

- Experienced advisors preparing to take on leadership roles
- Successors aiming to transition into firm ownership

Program Structure

- 6-month commitment to growth and development
- One in-person retreat to dive deep into leadership and sales strategies
- Webinars and consulting providing ongoing education and guidance

Cost to the advisor: $3,000*

*Travel costs (hotel and airfare) for in-person retreats are not included.

Advisor Benefits Program Tier Pricing (discount applied):

- Premier Elite: $2,000
- Gold: $1,500
- Platinum/Platinum Elite: $1,000

Advance Your Leadership Journey Today

AssetMark Advance provides access to a dynamic community of advisors. Whether you're advancing within your firm or building your own practice, AssetMark Advance provides the professional guidance and strategies for your leadership journey.

Reach out to AssetMark today and discover how our Advance program can help you build the leadership skills to help you soar in your career.

LEARN MORE



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