

# Investment Solutions Providers



We provide a range of investment solutions, carefully researched and selected by our team of due diligence professionals.

Core Markets	Core Market Exposure	
Tactical Strategies	Enhanced Return Focus <hr/> Limit Loss Focus	
Diversifying Strategies	Equity Alternatives <hr/> Bonds & Bond Alternatives	

AssetMark strategies may include investments from the following<sup>1</sup>:



Investment Solutions Providers are subject to change.

1. This is a sample of the investment solutions providers we include. It is not intended to be a comprehensive list.

For financial advisor use with advisory clients.

When constructing portfolios, we believe it's important to go beyond traditional asset allocation. Strategies are assigned to each category based on the role they play in a portfolio.

		Role in a portfolio	What it is	What to expect
Core Markets	Core Market Exposure	Participation in economic growth	Broad market exposure mainly in stocks and bonds	Performance that will rise and fall with the markets
Tactical Strategies	Enhanced Return Focus	Take advantage of alpha opportunities	Focused strategy attempting to beat an index, typically equities	Seeks excess returns relative to the broad market
	Limit Loss Focus	Limit participation in large extended drawdowns	Dynamic equity exposure driven by discrete signals	Seeks to limit losses in extended downturns, lagging returns in sudden market rebounds
Diversifying Strategies	Equity Alternatives	Manage equity risk with high return impact, especially in market crises	Trend-following managed futures, taking long and short positions	Works to provide market-crisis alpha; can lag equities for long periods
	Bonds & Bond Alternatives	Manage equity risk with low return impact	Bonds and other low-volatility strategies	Low variance of returns

**AssetMark, Inc.**

1655 Grant Street  
10th Floor  
Concord, CA 94520-2445  
800-664-5345

**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. Investments in mutual funds and exchange traded funds that hold equities, bonds, and other securities can decline significantly in response to adverse market conditions, company-specific events, changes in exchange rates, and domestic, international, economic, and political developments. Investments in bonds and fixed income related securities involve market and interest rate risk (prices can decline, if interest rates increase), and default risk (an issuer being unable to repay principal and interest). High-yield bonds are generally subject to greater risk of default than investment-grade bonds. Real estate investments are subject to credit and market risks, typically based on changes in interest rates and varied economic conditions. Investing in alternative investments, including managed futures, commodities, and currencies is not appropriate for all persons, as the risk of loss is substantial. Investments in futures, including put writing, involve market, counterparty, leverage, liquidity, interest rate, foreign currency, commodity, volatility, and other risks. **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 an AssetMark Consultant.** AssetMark, Inc. is an investment adviser registered with the U.S. Securities and Exchange Commission. AssetMark Investment Management™, a division of AssetMark, Inc., includes AssetMark, Savos, and Aris strategies. GuideMark® and GuidePath® Funds are distributed by AssetMark Brokerage™, LLC, member FINRA, an affiliate of AssetMark, Inc. AssetMark and third-party strategists and investment providers are separate and unaffiliated companies. AlphaSimplex is a service mark of AlphaSimplex. DoubleLine is a registered trademark of DoubleLine Capital LP. ©2023 AssetMark, Inc. All rights reserved.

21928 | C23-19800 | 06/2023 | EXP 06/30/2025