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AssetMark Announces 2024 Practice Excellence Award Recipients

CONCORD, Calif., June 03, 2024 (GLOBE NEWSWIRE) -- [AssetMark](#) (NYSE: AMK), a leading wealth management platform for financial advisors, today announced the recipients of its 2024 Practice Excellence Awards. These awards, now in their seventh year, recognize financial advisory firms that have made significant achievements in the areas of operational excellence and technology adoption at AssetMark.

This year's honorees are:

2024 Operations Excellence Award – Accuracy of Submitted Client Requests

Sharla Rountree, Jill Ruckle, KC Butcher, Fred Apodaca, and Dylan Birkinsha, [Personal Benefit Financial](#) (Lakewood, CO)

Brian Smith, [B. Riley Wealth](#) Management (Memphis, TN)

Kevin Poulsen and Jeanie Bosen, [Allegis Financial Partners](#) (Nampa, ID)

John Stover, [Focus Financial Group](#), LLC (Franklin, TN)

2024 Digital Practice Award – Overall Adoption of AssetMark Digital Tools

Rick Campbell, Mark Lavalley, and Kevin Pierro, [Financial Independence, LLC](#) (Warwick, RI)

Scott Olson, [GTX Wealth](#) (Georgetown, TX)

Lee Dailey, [Dailey Wealth Management](#) (Centennial, CO)

Tyler Otto, [Escape Velocity Financial Planning](#) (Centennial, CO)

2024 Green Planet Award – Adoption of eDelivery

Stephen Brubaker, [ERSI Wealth Management](#) (Centennial, CO)

Chris Drouin, [Beyond Wealth Management Group, LLC](#) (New Paltz, NY)

Tanya Duboue, [ENT Credit Union](#) (Colorado Springs, CO)

"We are honored to recognize these financial advisory firms for their adoption of AssetMark's digital tools to perform traditionally manual middle- and back-office functions," said Carrie Hansen, EVP and COO of AssetMark. "By embracing technology, these advisors were able to complete client requests faster and more accurately than ever before. This freed up valuable time so they could focus on what's really important – serving their clients."

The Practice Excellence Awards were announced during the kick-off of AssetMark's annual Customer Obsession Week, a week-long celebration starting today through June 7, 2024.

"Customer Obsession Week is one of the year's major highlights for our company," said Hansen.

"This is a time when we bring the entire AssetMark team together to celebrate our people, our amazing advisors, and the incredible work they do to support their clients' hopes, dreams, and aspirations. By recognizing these 11 award winners for their significant achievements in the areas of operational excellence and technology adoption, we're underscoring how important it is for financial advisors to embrace digital tools as a way to strengthen their own client-obsessed culture and stay competitive."

The 2024 Practice Excellence Awards are issued by AssetMark and recognize financial advisory firms for embracing AssetMark technology to perform traditionally manual middle- and back-office functions. Award recipients were selected by a panel of senior leaders in AssetMark's Operations

and Service organization. Nominees were evaluated based on usage of our digital tools, accuracy, and volume of work. Third-party rankings and recognitions are no guarantee of future investment success and do not ensure that a client or prospective client will experience a higher level of performance or results.

About AssetMark

AssetMark operates a wealth management platform that powers independent financial advisors and their clients. Together with our affiliates Voyant and Adhesion Wealth, we serve advisory firms of all sizes and business models at every stage of their journey with flexible, purpose-built solutions that champion client engagement and drive efficiency. Our ecosystem of solutions equips advisors with services and capabilities that would otherwise require significant investments of time and money, ultimately enabling them to deliver better investor outcomes and enhance their productivity, profitability, and client satisfaction.

Founded in 1996 and based in Concord, California, the company has over 1,000 employees. Today, the AssetMark platform serves over 9,200 financial advisors and 257,000 investor households. As of March 31, 2024, the company had \$116.9 billion in platform assets.

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