



ASSETMARK™

Business Assessment Report

Firm Performance Relative To Firm Goals and Peer Group Benchmarks

(note: a maximum of 9 KPIs are displayed, all values are annualized)

Peer Group

| Firm Financials | Your Firm | Benchmarks |
|------------------------------|-----------|------------|
| Total Firm AUM | | |
| Total Clients | | |
| Recurring Revenue | | |
| Total Revenue | | |
| Total Expenses | | |
| Operating Profit | | |
| Projected Annual Growth Rate | | |



Learn how to unlock goal tracking by reaching out to your Regional AssetMark Consultant

Value Maximization Index™

Firm Relative to Peer Group Benchmark

Valuation Range

Firm Relative to Peer Group Benchmark

- Managing Your Practice
- Marketing Your Business
- Optimizing Your Operations
- Empowering Your Team

Key Performance Indicators(KPIs): Firm Performance Relative to Goals and Peer Group Benchmarks

(note: a maximum of 9 KPIs are displayed, all values are annualized)

| Metric | | Benchmarks |
|-------------------------------|--|------------|
| Recurring Revenue per Client | | |
| Recurring Revenue per Advisor | | |
| Total Revenue per Client | | |
| Total AUM per Client | | |
| Total AUM per Advisor | | |
| Profit per Client | | |
| Profit as a % of Revenue | | |
| Clients per Advisor | | |
| Revenue as BPS on Assets | | |



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