

Business Assessment Report

Firm Performance Relative To Firm Goals and Peer Group Benchmarks

(note: All Firm Financial 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		



Goal tracking is available for AssetMark advisors. Contact your AssetMark Regional Consultant now.

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

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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