

The Power of Outsourcing Investment Management

In order to better understand the barriers and the benefits of outsourcing, AssetMark engaged Q8 Research to survey over 700 financial advisors on the topic of investment management outsourcing.

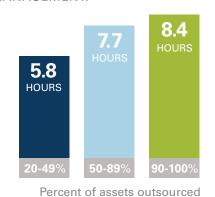


MORE THAN 3 OUT OF 4

78% of advisors wish they had outsourced assets sooner and 79% plan to increase the percentage of outsourced assets in the next three years.

Advisors noted a time benefit of more than 8 hours per week when nearly all investment management tasks were outsourced.

HOURS SAVED PER WEEK ON INVESTMENT MANAGEMENT:



98% of outsourcing advisors surveyed stated they delivered better investment solutions due to outsourcing.





Nearly **9** out of **10** outsourcing advisors surveyed stated that the benefits of outsourcing investment management have met or exceeded their expectations.

Advisors who outsourced investment management reported stronger client relationships, higher retention and increased acquisition rates.

% OF ADVISORS WHO SAY OUTSOURCING HELPS DELIVER:



Advisors who outsourced experienced a growth in their total assets under management, higher personal income and lower operating costs for their practice. The same advisors quantify this benefit as delivering, on average, double digit improvement across all three factors.

77% experienced on average:

27%

GROWTH in total assets under management

72% experienced on average:

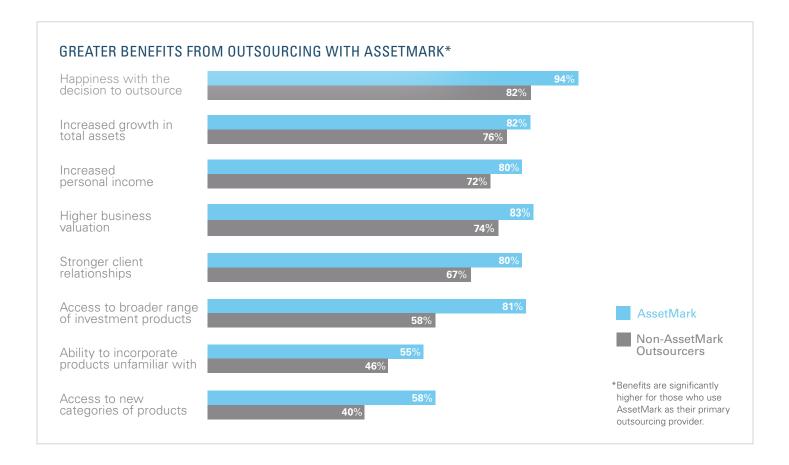
26%

A HIGHER personal income

67% experienced on average:

170/0

V LOWER operating costs



START YOUR OUTSOURCING JOURNEY WITH ASSETMARK

If you'd like to learn more about how AssetMark can help you get started on outsourcing investment management, we're here to help. Email us at AMBusinessConsulting@assetmark.com or give us a call at 833-273-0409.

Source: AssetMark 2019 Impact of Outsourcing Study.

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