

2007 Readers' Choice Awards

The results are in and the readers have spoken. *Boomer Market Advisor* undertook its 2007 Readers' Choice Awards survey to call attention to the products advisors are using to address boomer retirement needs. Longevity and income issues, as well as rising health-care costs, are just a few of the risks boomer advisors are grappling with. Each winner was singled out for its ability to help advisors in-turn help their boomer clients. As is almost always the case, some of the results were predictable, some were surprising, but all were educational.

— John Sullivan, Editor, *Boomer Market Advisor*

QUESTION NO. 7

Which separately managed account platform best suits your clients' needs?

WINNER

ASSETMARK INVESTMENT SERVICES

In a reversal from last year, AssetMark beat out upstart Curian Capital. Founded in 1996, AssetMark provides services to 1,400 advisory firms and administers 47,000 investor portfolios. Total assets increased from \$8 billion to \$14 billion since last year's survey, not a bad rate of growth. Genworth's acquisition of the separate account provider raised the company's profile, and our readers took notice.



ASSETMARK INVESTMENT SERVICES

"I like their process. Their third party money management is not a cookie cutter approach. They're flexible and customize to your business and client requirements. They work with UITs, VAs, ETFs, individual stock for the higher end clients. They're flexible in their reporting. They have a great book, The Art of Investing and Portfolio Management and a boot camp that goes with it. It's not at all about promoting AssetMark. It was probably the most worthwhile industry event we attended last year."

— Mark Bain, principal, Bain Wealth Management Group, Salem, Ore.

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