



ASSETMARK CASH ADVANTAGESM PROGRAM

featuring
Cash Advantage Checking



CONVENIENCE, FLEXIBILITY, FUNCTIONALITY

—that’s what the Cash Advantage checking account delivers for clients who want the best tools for managing their daily finances. Linked to the AssetMark Trust custodial account, the Cash Advantage checking account offers all the features and benefits of a premium bank account, plus access to the client’s portfolio funds.

CASH ADVANTAGE CHECKING ACCOUNT:

The choice is clear.

- ✓ FDIC insured
- ✓ Unlimited check-writing privileges
- ✓ Monthly sweeps to/from the account based on client balance elections
- ✓ Automatic overdraft protection for checks and Bill Pay through available funds in the linked AssetMark Trust custodial account
- ✓ Free standard checks
- ✓ ATM access with VISA® debit card
- ✓ Online Funds Transfer tool
- ✓ Cash Advantage CA Mobile app – includes check deposit feature
- ✓ Market competitive interest rate among brokerage checking products*



CONTACT US

Phone: 877.648.4880 (M-F 8:30 a.m.-10:00 p.m. ET)

Email: cashadvantage@thebancorp.com

Web: cashadvantageclient.com

* Interest is currently paid on personal, trust and nonprofit business accounts. To help maintain the security of financial information, do not include confidential personal information such as account numbers or Social Security numbers in non-secure email correspondence. Cash AdvantageSM is a service mark of AssetMark Trust Company, an Arizona trust company. Banking services, including Cash Advantage, are provided by The Bancorp Bank. AssetMark Trust Company and The Bancorp Bank are separate and unaffiliated companies.
409 Silverside Road, Suite 105, Wilmington, DE 19809 REQ0001264 AssetMark 03/2021

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32010 | C21-17399 | 03/2021 | EXP: 03/31/22

