

## YOUR INVESTMENT CONSULTANT TEAM

Michael and his team specialize in helping you grow your practice by providing highly customized investment solutions.



**Michael Cole, CFP®, CFS®**

*Senior Investment Consultant*

Contact Michael for new business opportunities and case design for new clients. For over ten years, he has been dedicated to helping financial advisors deliver investment success to clients.

### Contact

Email: [mcole@ccmg.com](mailto:mcole@ccmg.com)  
Cell: 704.280.6114



**Rob Holmes**

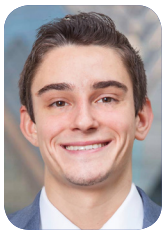
*Relationship Manager*

Rob is a licensed internal sales consultant dedicated to educating you on our strategies. He has a solid understanding of the financial markets and the implications to your advisory business.

Call Rob for help with investment proposals, marketing materials, or general questions.

### Contact

Email: [rholmes@ccmg.com](mailto:rholmes@ccmg.com)  
Office: 215.618.8144



**Jake Whitmoyer**

*Sales Coordinator*

Jake is your home office support expert. He supports Team Cole, helping ensure you are connected to all the resources available at Clark Capital Management.

## CLIENT PORTFOLIO MANAGEMENT TEAM

Team Dorsey provides comprehensive services, including quarterly reviews, on existing client accounts over \$1 million.

### Contact

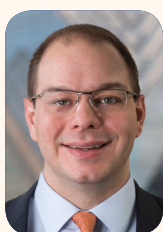
Email: [cpmteamdorsey@ccmg.com](mailto:cpmteamdorsey@ccmg.com)  
Office: 215.618.8148



**Glenn Dorsey, CFA®, CAIA**

*Senior Vice President, Client Portfolio Manager*

Glenn and his team work with Portfolio Managers and your Investment Consultant to help you grow your business and communicate your investment expertise to high net worth clients.



**John Archbold, CFA®**

*Client Portfolio Analyst*

John's expertise includes investment planning strategies for complex client cases, such as managed tax transition strategies, option overlay strategies for concentrated positions, and personalized income planning.

Call John to schedule CFA-level quarterly portfolio reviews or to discuss current client cases over \$1 million.



## CLIENT PORTFOLIO MANAGEMENT (CPM)

# Focused on Helping You Deliver A Superior Client Experience

Clark Capital's Client Portfolio Managers work side-by-side with Portfolio Managers and Investment Consultants to help you grow your business and clearly communicate your investment expertise to high net worth clients.

### BENEFITS TO YOU

- **Deliver Sophisticated Presentations with Compelling Analytics** via an institutional-level investment proposal. Demonstrate how you may be able to help high net worth investors achieve their unique goals.
- **Provide Advanced Investment Planning Strategies** to your most valued clients, including option overlay strategies for concentrated positions, managed tax transition strategies, and personalized income planning.
- **Supply Concierge Level Portfolio Oversight** with uniquely customized investment planning and ongoing services to high net worth investors.

### WORKING WITH CLIENT PORTFOLIO MANAGERS

Account Value	\$500,000 to \$1,000,000	Over \$1,000,000	Over \$5,000,000
Current portfolio cost analysis — highlight how you may be able to lower fees for the client.	✓	✓	✓
Personalized investment proposal — show how you may be able to help investors achieve their unique goals and objectives.	✓	✓	✓
Proposal review with a Relationship Manager or your Investment Consultant.	✓	✓	✓
Sophisticated portfolio analysis, including critique of current portfolio, holdings analysis and bond diagnostics with recommendations.		✓	✓
Institutional investment proposal.		✓	✓
Dedicated quarterly portfolio reviews by phone with a CFA-Level Client Portfolio Manager.		✓	✓
In-person access to Client Portfolio Managers.			✓
Direct access to senior leadership at Clark Capital.			✓

Clark Capital Management Group, Inc. is an investment adviser registered with the U.S. Securities and Exchange Commission. Registration does not imply a certain level of skill or training. More information about Clark Capital's advisory services and fees can be found in its Form ADV which is available upon request. CCM-1049