Your Investment Consultant Team

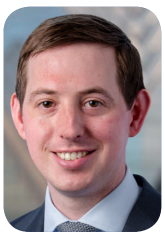
Ryan and his team specialize in helping you grow your practice by providing highly customized investment solutions.

Ryan Kenney, CIMA®, AIF®

Senior Investment Consultant

Contact Ryan 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:	rkenney@ccmg.com
Office:	215.618.8124
Cell:	215.805.1075



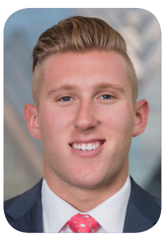
Doug Anders, CFP®

Relationship Manager

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

Contact	
Email:	danders@ccmg.com
Office:	215.618.8102



Steve Elf

Sales Coordinator

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

Client Portfolio Management Team

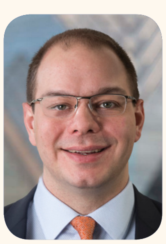
Team Dorsey provides comprehensive services, including quarterly reviews, on existing client accounts over $1 million.

Contact	
Email:	cpmteamdorsey@ccmg.com
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.

Clark Capital MANAGEMENT GROUP

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.			✓