Your Regional Support Team

Your investment consultant team specializes in helping you grow your practice by providing highly customized investment solutions.

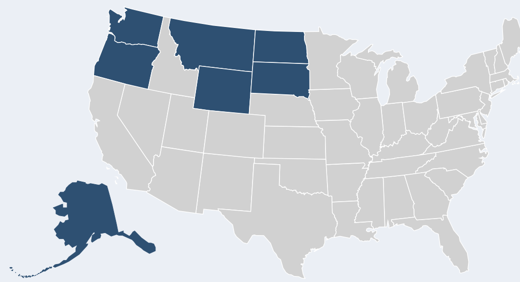
Connor Thompson

Platform Investment Consultant

As your Investment Consultant at Clark Capital, Connor is responsible for supporting Clark Capital's partnerships with advisors and their high net worth clients. Connor and his team specialize in providing highly customized investment solutions and superior client support. Connor is your first point of contact for case design, portfolio analysis, and presenting Clark Capital's investment recommendations to your high net worth clients.

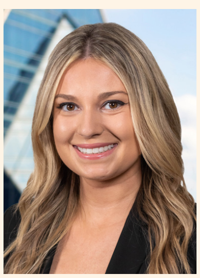
cthompson@ccmg.com | Cell: 215.589.2264

Pacific Northwest Territory



For more information, contact your IC Team at TeamThompson@ccmg.com

Benefits to You	Dedicated Support	Custom Proposals	High Net Worth Services



Jenna Kepner

Platform Consultant

Jenna supports partner advisors to help deliver successful financial outcomes to their clients. Jenna can help provide ongoing economic/market updates, assist you at the point of sale to articulate Clark Capital's investment solutions, and generate custom, client-friendly proposals illustrating Clark Capital's investment process and solutions.

jkepner@ccmg.com | Direct: 215.999.8268

Navigate Your Future. Enjoy the Journey.

Your Client Portfolio Management Team

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

Peter J. Eisenrich, CFA®

VP, Senior Client Portfolio Manager

Pete helps Clark Capital's silver, gold, and platinum advisors ($10m+) construct highly personalized investment solutions for high net worth investors. Pete can provide a comprehensive review of portfolio performance and detailed market outlooks, address any changes to the client's long-term financial goals or risk tolerance levels, and uncover opportunities to expand your client relationships.

cpmteameisenrich@ccmg.com

Joshua Graff, CFA®

Associate Client Portfolio Manager

Josh works with your Investment Consultant and our Portfolio Managers to construct highly personalized investment solutions for high net worth investors. Josh can provide a comprehensive review of portfolio performance and detailed market outlooks, address any changes to the client's long-term financial goals or risk tolerance levels, and uncover opportunities to expand your client relationships.

Emily Thompson

Tax Transition Specialist

Emily assists advisors with creating personalized tax transition strategies to help high net worth clients thoughtfully reinvest their assets into a long-term strategy while spreading realized gains out over time.

Patrick Schultz, J.D.

Senior Wealth Planner

Patrick works closely with clients' legal and tax advisors to provide expertise across a wide range of wealth planning strategies. He specializes in estate and tax planning strategies, charitable planning, executive and equity compensation planning, business succession planning, pre- and post-transactional planning, concentrated position management, and other personal planning strategies.