Clark Capital MANAGEMENT GROUP

Focused on Helping You Deliver A Superior Client Experience

Clark Capital's Client Portfolio Management (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.

Benefits to You

- Sophisticated Presentations with Compelling Analytics
- Advanced Investment Planning Strategies
- Concierge Level Portfolio Oversight

Working with the Client Portfolio Management Team

Services Available to You and Your Clients	Client Household Account Value: $500,000 to $1,000,000	Over $1,000,000	Over $5,000,000
Current Portfolio Cost Analysis	✓	✓	✓
Personalized Investment Proposal	✓	✓	✓
Proposal Review with a Relationship Manager or Investment Consultant	✓	✓	✓
Current Holdings Analysis and Bond Diagnostics with Recommendations	✓	✓	✓
Institutional Level Investment Proposal		✓	✓
Quarterly Portfolio Reviews by Phone with a CFA-Level Client Portfolio Manager		✓	✓
In-Person Access to CPM Team			✓
Direct Access to Senior Leadership at Clark Capital			✓

A Long-Term Partnership to Help You Grow Your High Net Worth Business	Assets Under Management with Clark Capital: $10 million	$25 million	$50 million
Annual Book Review with a CPM Team Member	✓	✓	✓
Quarterly Client Economic and Capital Market Review Group Call	✓	✓	✓
Quarterly Portfolio Reviews by Phone with the Head of Your CPM Team		✓	✓
Monthly Market Recap of Investment Team Insights		✓	✓
2 Days Worth of Exclusive Time with the Head of Your CPM Team		✓	
4 Days Worth of Exclusive Time with the Head of Your CPM Team			✓