Clark Capital
MANAGEMENT GROUP

Client Portfolio Management

Your Dedicated High Net Worth Support Team

Navigate Your Future. Enjoy the Journey.

Navigator® Elite Advisor Program

High Net Worth Services to Help 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

Services Available to You and Your Clients	Client Household Account Value: $500,000 to $1 Million	Over $1 Million	Over $5 Million	Over $10 Million
Current Holdings Analysis and Bond Diagnostics with Recommendations	✓	✓	✓	✓
Current Portfolio Cost and Tax Transition Analysis	✓	✓	✓	✓
Personalized Investment Proposal	✓	✓	✓	✓
Proposal Review with Your Investment Consultant Team	✓	✓	✓	✓
Institutional Level Investment Proposal		✓	✓	✓
Quarterly Portfolio Reviews by Phone with a CFA-Level Client Portfolio Manager		✓	✓	✓
In-Person Access to the Head of Your CPM Team				✓
Access to Portfolio Management Leaders at Clark Capital				✓
In-Person Access to Trust and Estate Planning Services with a Senior Wealth Planner				✓

Navigator® Elite Advisor Program

The Navigator® Elite Advisor Program is designed to provide tools and resources to help you grow and retain your high net worth business.

As your assets under management with Clark Capital grow, you'll have access to a wide range of exclusive concierge-level services from our CPM Team.

For more information, contact your Investment Consultant

A Long-Term Partnership to Help You Grow Your High Net Worth Business	Navigator® Elite Advisor Program (AUM with Clark Capital): Silver $10 million	Gold $25 million	Platinum $50 million
Annual Book Review with the Head of Your CPM Team	✓	✓	✓
Quarterly Client Economic and Capital Market Review Group Call	✓	✓	✓
Monthly Market Recap of Investment Team Insights	✓	✓	✓
Access to Behavioral Finance Coaching		✓	✓
Quarterly Portfolio Reviews by Phone with the Head of Your CPM Team		✓	✓
Annual In-person Event with the Head of Your CPM Team		✓	
Annual In-person Event with Glenn Dorsey, Head of Client Portfolio Management			✓

Focused on Helping You Deliver a Superior Client Experience

Today's high net worth client has complex needs and high expectations. Our Client Portfolio Management (CPM) Team helps support advisors in their efforts to deliver a superior client experience.

Clark Capital's CPM Team may help you:

- Grow your AUM through consolidation of assets and increased referrals
- Compete effectively with wirehouses and banks
- Navigate fee/performance-based conversations with your clients
- Simplify the portfolio construction process and speed up implementation of the client's investment plan
- Manage client cases that have unique tax needs
- Differentiate your business through legacy planning, helping you reach a new generation of clients

Benefits of Working With the CPM Team

A suite of resources designed to help you attract and retain high net worth business:

Book Reviews

Portfolio Analysis

Portfolio Construction

Point of Sale Support

Advanced Wealth Planning*

Market Update Calls

Quarterly Reviews

Commentary & Resources

Tax Transitions

*Advanced Wealth Planning is available to households over $10 million

Client-Friendly Resources to Help You Attract High Net Worth Business

Our CPM Team provides institutional quality analysis, resources, and tools to help you grow your business.

- **Holdings Analysis and Bond Diagnostics**
  Consolidated and comprehensive holdings analysis evaluates your clients' current portfolio diversification and identifies any concentration risks.
- **Custom Tax Transitions**
  When transitioning an account to Clark Capital, our CPM Team can work with you to create a custom tax transition plan to help smoothly transition a client's assets over multiple tax years.
- **Personalized Investment Proposals**
  Create personalized investment proposals designed to help you clearly communicate the expertise you provide to your high net worth clients. For households accounts over $1 million, we offer institutional level proposals with full market and economic commentary.
- **Portfolio Construction**
  Develop individualized and diversified portfolios that thoughtfully blend Clark Capital's equity and fixed income strategies. We place your clients' goals and objectives at the forefront, with an eye towards tax efficiency.
- **Point of Sale Support**
  Your CPM Team can meet with you and your high net worth prospects to discuss Clark Capital's proposed investment solution.

A Long-Term Partnership To Help You Retain Your High Net Worth Clients

When your clients open an account with us, it's not the end of our relationship —it's just the beginning. Our CPM Team provides concierge-level portfolio monitoring and account maintenance, so you can spend your time focusing on your clients and what's important to them.

- **Quarterly Client Reviews**
  Quarterly Client Reviews provide advisors and their clients an economic and capital market assessment and a straightforward review of their portfolio composition and performance. When appropriate, investment recommendations are made to realign portfolios with changes to the clients' goals or Clark Capital's investment outlook.
- **Market Update Calls**
  Market Update Calls help keep your clients up-to-date on the markets, so they can remain calm and on track to achieve their financial plan.
- **Annual Book Reviews**
  Annual Book Reviews provide a holistic and comprehensive market and strategy review to make sure all your accounts are aligned with client goals and Clark Capital's latest investment recommendations.
- **Ongoing Education and Resources**
  Ongoing investment expertise and white glove service designed to keep you up-to-date on Clark Capital's strategies. Resources include timely commentary, webinars, and events to help support your client conversations.

Wealth Planning Services

Clark Capital's wealth planning capabilities are designed to help you grow your business and enhance the high net worth experience you provide to your clients. Full access to our suite of comprehensive wealth planning services is available to client households exceeding $10 million, at no additional cost to the advisor or client.

Trust and Estate Planning

We work collaboratively with clients' legal and tax advisors to create and implement effective wealth transfer strategies that are aligned with your clients' goals.

Strategic Tax Management

By strategically managing their tax liabilities, clients can help reduce their current and future tax burdens, while preserving and growing their wealth.

Concentrated Position Planning

Our team provides personalized guidance to financial advisors and their clients on issues related to both public and private concentration in equity positions. We help develop strategies for asset location, diversification, charitable giving, and liquidity management to manage risks associated with concentrated positions.

Philanthropic Planning

We help develop a personalized strategy that aligns with your clients' values and helps you maximize their impact. Our team leverages expertise in a broad range of philanthropic vehicles, such as donor-advised funds, private foundations, and charitable trusts, to help clients achieve their philanthropic goals.

Business Succession Planning

Our team helps clients navigate the complex process of business succession planning.

Equity Compensation Planning

We can support your efforts to help clients navigate the complexities of equity compensation.

An Extension of Your Team

Our team of CFA® Charterholders works side-by-side with Portfolio Managers and Investment Consultants to help you clearly communicate the investment expertise you provide to your high net worth clients.

Client Portfolio Managers are supported by a team of Analysts, Coordinators, and Tax Transition Specialists to help you design highly customized portfolios and provide a white glove client experience.

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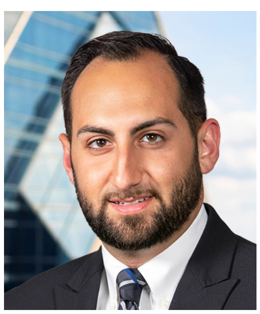

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