



Overview

Navigator® Elite Advisor Acceleration Program

Helping You Grow Your Business with Personalized Support

This program is designed to provide you with 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 Client Portfolio Management Team.

Navigator® Elite Advisor Acceleration Benefits:

- **Point of Sale Support for New Business Opportunities**
 - Your Investment Consultant Team will meet with you and your high net worth prospects to discuss the investor's case design, portfolio analysis, and corresponding Clark Capital recommendations
- **Semi-annual Portfolio Reviews for Clients Under \$1m**
 - Straightforward review of portfolio performance and detailed market outlook with you and your client
 - Address any changes to the client's long-term financial goals or risk tolerance
 - Uncover opportunities to expand the client relationship
- **Annual Capital Markets Review Call for Your Clients and Prospects with a Client Portfolio Manager**
- **Monthly Newsletter**
 - 3 Best Things I Read This Month
 - Advisor Best Practices
- **Staff Recognition**
 - My team will develop a partnership with your staff, with the goal of ensuring both teams operate seamlessly together to help you grow your business

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



Market
Update Calls



Semi-annual
Reviews



Commentary &
Resources



Tax
Transitions



Overview

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Disclosure

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