

Join Us for this
In-Person Event

Your Presenters:



Glenn Dorsey, CFA[®], CAIA[®]
Head of Client Portfolio Management



Patrick Schultz, J.D.
Senior Wealth Planner

Navigate Your Future.
Enjoy the Journey.

Clark Capital Management Group, Inc. is an investment adviser registered with the U.S. Securities and Exchange Commission. Registration does not imply a certain level of skill or training. More information about Clark Capital's advisory services can be found in its Form ADV which is available upon request.

Nothing herein should be construed as a solicitation, recommendation, or an offer to buy, sell or hold any securities, other investments or to adopt any investment strategy or strategies. This information is not intended to serve as investment advice.

You're Invited!

Clark Capital's Advanced Planning High Net Worth Capabilities

Wednesday, August 2, 2023
11:30 a.m. CDT

Please join us for this special opportunity to learn about Clark Capital's new wealth planning services with Senior Wealth Planner Patrick Schultz, J.D. and Head of Client Portfolio Management Glenn Dorsey, CFA[®], CAIA[®]. During this in-person event, we'll provide an overview of our new suite of advanced planning strategies designed to help you move "up-market" and grow your high net worth business. Lunch will be served.

Event Details:

Your Host: Kade Vasi, CPWA[®], CIMA[®], Investment Consultant
Clark Capital Management Group

Date: Wednesday, August 2, 2023

Time: 11:30 a.m. CDT

Place: [The Capital Grille](#)
101 S Hanley Rd Suite 250, Clayton, MO 63105
314.725.0930

Topics to be discussed include:

11:30 – 11:40 Welcome and Intro to Clark Capital

11:40 – 12:20 Answers to Today's Top Questions from Affluent Investors

12:20 – 12:55 Winning and Retaining High Net Worth Clients

12:55 – 1:00 Closing Remarks

We hope you can join us!

RSVP to:

Brian Conway, 215-999-8275
TeamVasi@ccmg.com

These are the views of Clark Capital, Glenn Dorsey, and Patrick Schultz, and should not be construed as investment advice. Clark Capital does not give tax or legal advice. All information is believed to be from reliable sources; however, we make no representation as to its completeness or accuracy. Please consult your Financial Representative for further information. The economic forecasts set forth in this material may not develop as predicated and there can be no guarantee that strategies promoted will be successful.