

Join Us for this
Live 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.

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You're Invited!

Clark Capital's Advanced Planning High Net Worth Capabilities

Tuesday, September 12, 2023
4:30 p.m. PDT

Please join us for this special opportunity to learn about Clark Capital Management's Advanced Planning High Net Worth Capabilities. During this live, in-person event, we'll provide our latest market insights for the year ahead and strategies to move "up-market" and grow your business by winning the high-net-worth client. Dinner will be served.

Event Details:

Your Host: Justin Terman, Investment Consultant
Clark Capital Management Group

Date: Tuesday, September 12, 2023

Time: 4:30 p.m. PDT

Place: [The Bridges Golf Club](#)
9000 S Gale Ridge Road, San Ramon, CA 94582
925.735.4235

Topics to be discussed include:

4:30 – 4:40 Welcome and Intro to Clark Capital

4:40 – 5:20 Answers to Today's Top Questions from Affluent Investors

5:20 – 5:55 Winning and Retaining High Net Worth Clients

5:55 – 6:00 Closing Remarks

We hope you can join us.

RSVP to:

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