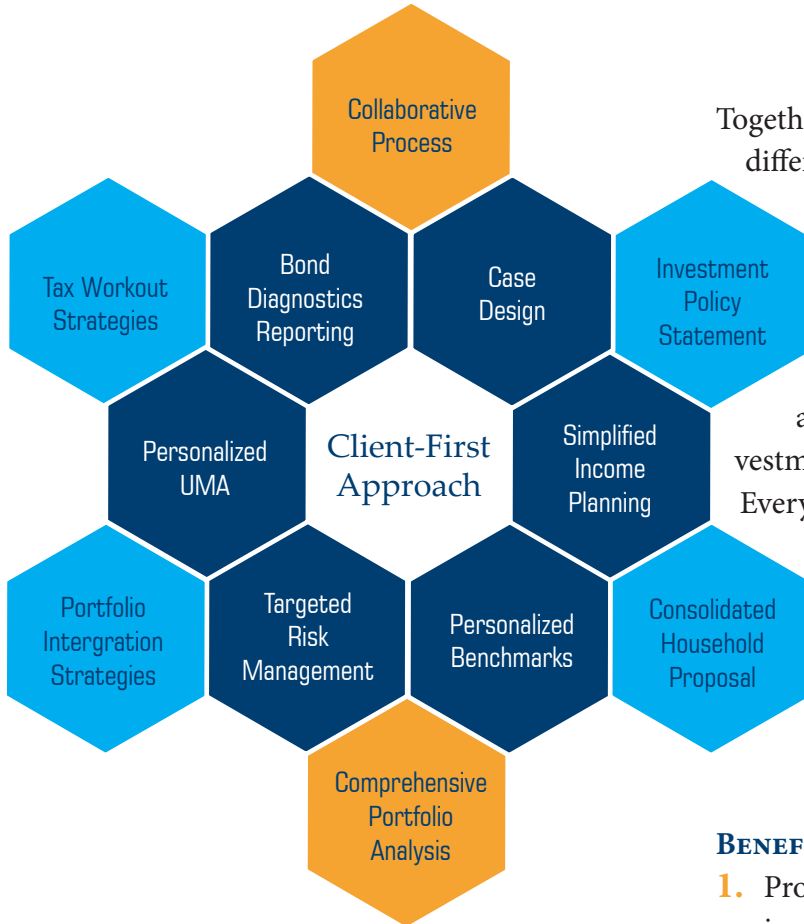


Personalized Portfolio Management

A Client-First Approach



Together, advisors and asset managers can make a positive difference in clients' lives. By putting an emphasis on delivering comprehensive, personalized portfolio management, Clark Capital supports advisors in their efforts to deliver financial wellness to clients.

We believe a client-first approach to portfolio management can help clients remain committed to their investment strategies in order to reach their long-term goals. Every client is unique, and investments should reflect that.

BENEFITS TO YOU AND YOUR CLIENTS:

1. Provide comprehensive coverage for each stage of the investor life cycle in a personalized financial plan
2. Support for your financial plan with targeted investment strategies and a simplified income plan
3. Personalize risk management efforts to help the client remain within their risk comfort zone through good and bad markets

What we believe makes personalization so compelling is its ability to provide clients with a sense of control over their own destiny. In doing so, it can prevent emotions from derailing investment plans and promote successful outcomes.



Why Partner with Clark Capital?

A highly collaborative and consultative process is essential to helping provide a better client experience in our opinion. We provide you with the following tools:

CASE DESIGN: An asset manager that offers case design as part of the partnership can be a plus. Through the case design process, you can ensure the investments are tailor made to meet the client's needs and objectives.

SIMPLIFIED INCOME PLANS WITH PERSONAL BENCHMARKS: The right income planning software can help you identify the impact of outside sources of income such as social security and assets held away from your advisory oversight. It can help you identify the client's personal benchmark and use it to ensure the client is on track to maintain their lifestyle in retirement.

PERSONALIZED UNIFIED MANAGED ACCOUNT (UMA) TECHNOLOGY: Since a personalized investment portfolio often requires multiple strategies, we believe the number of accounts and individual strategies are best handled as "sleeves" within a single account. Advanced UMA technology can help you simplify paperwork and reporting and make changes in the allocation when necessary.

ASSET LOCATION AND TAX MANAGEMENT: Sophisticated UMA technology can help advisors create tax-smart strategies to help clients avoid paying unnecessary taxes and keep more of what they earn. Through the financial planning process and close collaboration with an asset manager, advisors can help plan for optimal asset location across accounts, which may help generate higher after-tax income for clients.

For more information or for a complementary case design for one of your clients, please call Clark Capital at 800.766.2264.

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