

A sailboat with a large, multi-colored sail (orange, blue, and white) is sailing on a blue ocean under a cloudy sky. The sailboat is positioned on the left side of the frame.

PARTNER

CONFERENCE

The Renaissance Hotel, Newport Beach, CA — March 13th & 14th

Navigate Your Future. Enjoy the Journey.

WELCOME!



We are excited that you are joining us for our 2018 West Coast Partner Conference. This opportunity for learning and discovery will strengthen the ties between us.

This meeting has been designed with you in mind. It is my hope that you will recognize Clark Capital's unyielding commitment to helping you serve your clients and grow your business.

We believe our Navigator Investment Strategies are among the best in the industry, because they address the key challenges facing you and your clients.

Today, you'll hear from industry professionals and your peers as they discuss the importance of managing risk, returns and client emotions. We are excited to share their expert perspectives on delivering a great client experience in today's complex and ever changing business environment. We will introduce our approach to investing — one that allows you to build custom tailored strategies designed to meet your clients' unique objectives and goals.

We all look forward to getting to know you better and helping you focus on your most valuable role: understanding your clients' needs and helping them achieve financial security.

A handwritten signature in black ink that reads "Brendan M. Clark".

Brendan M. Clark, CFA®
Chief Executive Officer
Clark Capital Management Group, Inc.

SPEAKERS



Brendan Clark, CFA*
Chief Executive Officer

Brendan is Chief Executive Officer of Clark Capital Management Group. As the Firm's leader in defining and executing its vision and strategy, Brendan is tasked with aligning Clark Capital's mission with its stakeholders' needs. He oversees all of the Firm's business lines, including custom-tailored strategies for high-net-worth investors, 40 Act products and strategist model delivery, and works to develop and enhance strategic partnerships while creating opportunities for growth. Brendan's leadership of the Executive Team ensures that Clark Capital maintains its consistent, firm-wide focus on delivering world-class asset management strategies and services to advisors and investors.

Brendan joined Clark Capital in 2001 and held positions of increasing responsibility, including Executive Vice President of Business Development. In this capacity, he played a key role in significantly increasing the Firm's assets under management. Most recently as President, Brendan led the transformation of Clark Capital into a world-class asset management firm, directing all business development and marketing efforts and overseeing the creation and execution of key strategic relationships with broker-dealer partners and national platforms. He earned a B.S. in Economics from the University of Delaware, holds the Chartered Financial Analyst designation and is a member of the CFA* Institute and the CFA*Society of Philadelphia.



K. Sean Clark, CFA*
Chief Investment Officer

As Clark Capital's Chief Investment Officer, Sean oversees all of the Firm's investment activities and heads the Firm's portfolio team. Sean joined the firm in 1993 and is responsible for asset allocation and investment selection for Navigator Investment Solutions as well as directing ongoing market research and contributing to the development of proprietary products. Sean is a member of the Clark Capital Investment Committee and the Executive Committee. He graduated from the University of Delaware, earning a B.S. and an M.A. in Economics. Sean is a Chartered Financial Analyst and a member of the CFA Institute and the Financial Analysts of Philadelphia, Inc. Sean is considered an industry expert and is often asked to appear on CNBC and Bloomberg television to share his views on the market and has contributed to articles in a number of nationally distributed business journals and newspapers including *Business Week*, the *Chicago Tribune*, *LA Times*, and the *Financial Times*.



Christopher Cullen, CIMA*
National Sales Manager

Chris is the National Sales Manager for Clark Capital Management Group. In this role, he is responsible for leading Clark Capital's team of Investment Consultants and Relationship Managers in their efforts to build collaborative Partnerships with financial advisors. He has experience motivating and mentoring sales professionals as they help advisors in their efforts to deliver successful financial outcomes to their clients.

Prior to joining Clark Capital, Chris served as Divisional Vice President at Curian Capital and prior to that was a Regional Vice President for John Hancock. Chris earned a Bachelor of Science from the University of Richmond and holds the Certified Investment Management Analyst designation as well as the FINRA Series 6, 7, 66, and 24 licenses.



Steve Grant, CFP*
Chief Financial Officer

Steve is Clark Capital's Chief Financial Officer and portfolio manager of the Navigator Tax-Free Fixed Income program. Steve is a member of the Clark Capital Executive Committee. Steve is a key contributor to product development and to the implementation of industry and technological innovations. Steve's involvement in the financial industry began in 1976 with Hess Grant and Co. In 1989, Steve co-founded Williams Capital Markets, an institutional municipal bond firm. In 1996, he joined Clark Capital Management. Steve is a graduate of Franklin & Marshall College, attended the College of Financial Planning and holds the CFP designation.

SPEAKERS



Glenn S. Dorsey, CFA®, CAIA®
Senior Vice President
Client Portfolio Manager

Glenn is Senior Vice President and Client Portfolio Manager for Clark Capital Management Group. In this role, he is responsible for portfolio construction and the clear communication of investment strategy to advisors and their clients. Glenn is a key resource for Clark Capital's Investment Consultants and financial advisors.

Throughout Glenn's extensive experience as a Portfolio Manager and a Client Portfolio Manager, he has focused on helping advisors deliver great outcomes to their clients and institutions. His Portfolio Management experience includes equity, balanced, and fixed income investing for high net worth clients. Prior to joining Clark Capital, Glenn was the Co-Chief Investment Officer and Head of the Private Wealth Management Group at Curian Capital.

Glenn was awarded the Chartered Financial Analyst® (CFA®) and the Chartered Alternative Investment Analyst® (CAIA®) designations. He holds a bachelor's degree in finance and accounting from Rider University in Lawrenceville, New Jersey.



Tony Soslow, CFA®
Senior Portfolio Manager
Premier Equity Portfolios

Tony serves as a portfolio manager in the Premier Portfolios group and is a member of the Clark Capital Investment Committee. He has over 25 years of portfolio management experience utilizing both a quantitative and fundamental process. From 1997 to 2013 Tony was the President and Chief Investment Officer of Global Capital Management which he founded. His firm, Global Capital Management, was recognized as a "Top Guns Manager" in 2006 and 2007 and he was named "Manager of the Decade" in 2011 by PSN for the All Cap Strategy.* From 1986 through 1997, Tony was Director of Portfolio Management at RTE Asset Management where he was responsible for portfolio management across all asset classes. Tony is a graduate of the Wharton School of the University of Pennsylvania and holds the CFA® designation.



Maira F. Thompson
Senior Portfolio Manager
Premier Equity Portfolios

Maira is responsible for management of High Dividend Equity and customized portfolios in the Premier Portfolios group and is a member of the Clark Capital Investment Committee. Her more than thirty years of investment experience included the position of Vice President and head of the Philadelphia Investment Group for Meridian Asset Management. After Delaware Trust became part of Meridian, Maira managed their Trust Investment Group in Wilmington, Delaware. In the 1980s Maira managed assets for high net worth clients and co-managed a small cap fund for Fidelity Bank in Philadelphia. She began her career as a trader with Prudential Bache Securities and a licensed broker for Legg Mason Wood Walker. Maira is a graduate of Ohio Wesleyan University and undertook additional studies in economics at the London School of Economics. She joined Clark Capital in 1997.



Jamie Mullen
Senior Portfolio Manager
Premier Fixed Income Portfolios

As a Senior Portfolio Manager, Jamie manages the Taxable and Tax Free Fixed Income Strategies. He is a member of the Clark Capital Investment Committee. Jamie has over 25 years of experience with fixed income securities. He began in municipal credit research and worked in public finance before moving to a position in trading, where his experience included trading municipal bonds and employing fixed income futures and futures options. He has extensive experience in dealing with mutual funds, trust departments and money managers. He received his degree from St. Joseph's University and joined Clark Capital in 2005.

*See back cover for disclosure.



Jonathan A. Fiebach
Executive Vice President
Fixed Income

Jon is Clark Capital's Executive Vice President of Fixed Income. During his 30 years as a trader and senior portfolio management leader in the institutional bond industry, Jon has focused on the creation and supervision of actively managed, innovative fixed income strategies. Most recently he was co-founder of Main Point Advisors, where he was responsible for the implementation and management of non-traditional fixed income strategies.

At Clark Capital, Jon is responsible for the development and oversight of actively managed fixed income strategies that address the ever changing challenges and opportunities faced by bond investors. He is lead manager of the Navigator Duration Neutral Fund and a senior portfolio manager on the Navigator Tactical Fixed Income Fund.

Prior to founding Main Point Advisors in 2013, Jon was co-founder, Managing Director, and Chief Investment Officer of Duration Capital Management Advisors, Inc. From 1994 through 2002 Jon built and managed municipal and corporate bond trading at Susquehanna International Group, LP. Jon is nationally known for his publications and presentations including co-authoring *The Handbook of Municipal Bonds* (2008, John Wiley and Sons, Inc.). Jon graduated from Albright College with a BS in Business Administration and Political Science.



Brett McAvoy
Investment Consultant

Brett is an Investment Consultant at Clark Capital Management Group serving the southwestern part of the United States. He is responsible for supporting Clark Capital's partnerships with Wealth Advisors in their dedication to affluent families, high net worth individuals, foundations, and retirement plans. Together, Brett and his Partners specialize in providing highly customized and long-term investment solutions with a level of sophistication typically reserved for ultra high net worth and institutional investors. Brett assists his Partners in building their ideal wealth counseling practice and supports advisors with the tools, techniques and degree of service that allows them to focus on their clients' needs and financial security.

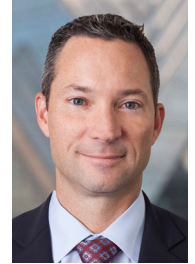
Prior to joining Clark Capital in 2017, Brett had over 13 years' experience in the financial services industry. He served as a Regional Business Consultant with Curian Capital and went on to represent firms offering annuities, mutual funds, separate accounts, and alternative investments. Most recently he was a Regional Vice President with Steadfast Capital Markets. Brett earned a B.A. from Brigham Young University.



Jim Agasar
Investment Consultant

Jim is an Investment Consultant with Clark Capital Management Group in the southwestern part of the United States. He is responsible for supporting Clark Capital's partnerships with Wealth Advisors in their dedication to affluent families, high net worth individuals, foundations, and retirement plans. He and his Partners specialize in providing highly customized and long-term investment solutions with a level of sophistication typically reserved for high net worth and institutional investors. Jim assists his Partners in building their ideal wealth counseling practice and supports advisors with the tools, techniques and degree of service that allows them to focus on their clients' needs and financial security.

Jim started in the financial services industry in 2006 after graduating from Penn State University, Smeal College of Business with a B.S. in Finance. Jim joined Lockwood Advisors Inc. as an institutional service desk representative. Soon after Jim joined Lockwood Advisors, the firm was acquired by BNY Mellon/Pershing LLC. Subsequently Jim became Institutional Account Manager and then Assistant Vice President of Institutional Account Management.



Zack Dukich
Investment Consultant

Zack is an Investment Consultant with Clark Capital Management Group serving the northwestern part of the United States. He is responsible for supporting Clark Capital's partnerships with Wealth Advisors in their dedication to affluent families, high net worth individuals, foundations, and retirement plans. He and his Partners specialize in providing highly customized and long-term investment solutions with a level of sophistication typically reserved for ultra high net worth and institutional investors.

Prior to joining Clark Capital, Zack has accrued over 13 years of experience in the financial markets. He started his career in 2000 as a market maker for Interactive Brokers on the Philadelphia Stock Exchange floor. Before joining Clark Capital, Zack helped manage an Equity Derivatives Sales Desk where he served large Wall Street institutions including banks, hedge funds, and OTC trading firms. Zack holds a B.S. from Brandeis University, a M.S. of Business and Public Management from The University of North Carolina at Pembroke, and the FINRA Series 7 and 4 licenses.

AGENDA

Tuesday, March 13th

6:00 to 10:00 p.m.

Cocktails & Dinner

Bamboo Garden

Wednesday, March 14th

8:00 to 9:00 a.m.

Breakfast

Orchid Terrace

9:00 to 9:15 a.m.

Welcome & Introductions

Conference begins in Bay Laurel South

Brendan M. Clark, CFA®, Chief Executive Officer

9:15 to 10:05 a.m.

Clark Capital's

Investment Philosophy & Process

K. Sean Clark, CFA®, Chief Investment Officer

Approved for
1 hour CFP® CE Credit

10:05 to 10:20 a.m.

Break

10:20 to 12:00 p.m.

Premier Portfolios: Specialized
Strategies for Unique Client Needs

Equity Panel:

Maira Thompson, Tony Soslow, CFA®

Fixed Income Panel:

Jamie Mullen, Steve Grant, CFP®, Jon Fiebach

12:00 to 1:00 p.m.

Lunch with the Portfolio Managers

Orchid Terrace

1:00 to 1:40 p.m.

Partner Panel: Hear from Your Peers

1:40 to 2:25 p.m.

Tying It All Together:
Tools to Attract and Retain High Net Worth Clients

Chris Cullen, CIMA®, National Sales Manager

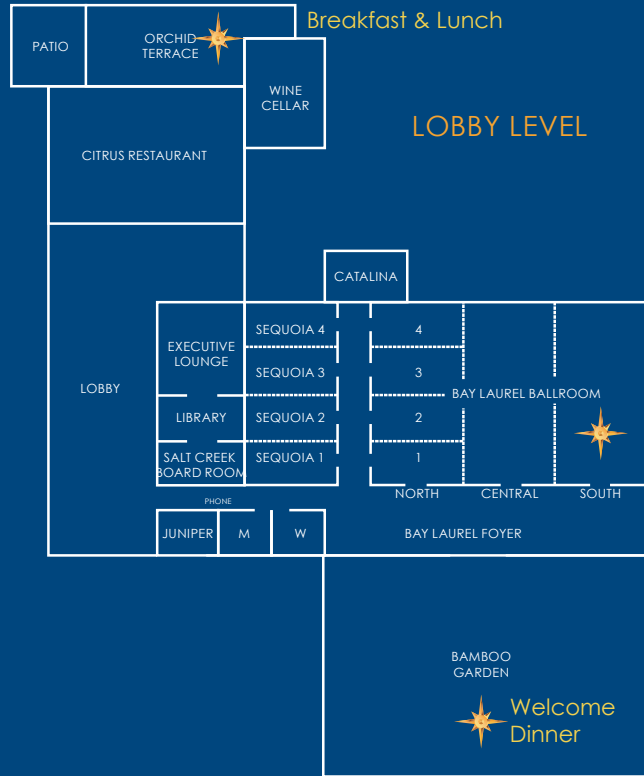
Zack Dukich, Investment Consultant

Glenn Dorsey, CFA®, CAIA®, Senior Vice President,
Client Portfolio Manager

2:25 to 2:30 p.m.

Closing Remarks

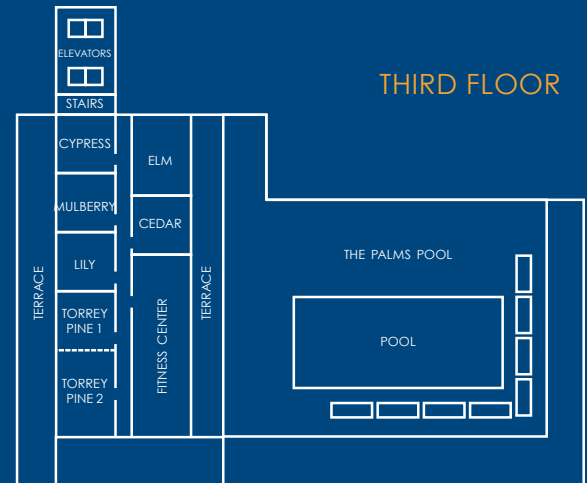
Brendan M. Clark, CFA®



Conference



RENAISSANCE
HOTELS



CFA® and Chartered Financial Analyst® are registered trademarks owned by CFA Institute.

Clark Capital Management Group, Inc. (Clark Capital) is an investment advisor registered with the United States Securities and Exchange Commission under the Investment Advisors Act of 1940, as amended. Registration does not imply a certain level of skill or training. Clark Capital is a closely held, mostly employee owned C Corporation with all significant owners currently employed by the firm in key management capacities. The firm specializes in managing equity and fixed income portfolios for individuals and institutions. More information about Clark Capital's advisory services and fees can be found in its Form ADV which is available upon request.

*Disclosure related to the recognition as a Top Guns Manager of the Decade. Top Guns Manager of the Decade is a recognition from Informa Investment Solutions PSN, an independent, national money manager database. This designation may not be representative of any one client's experience because the rating reflects an average of all, or a sample of all, the experiences of Mr. Soslow's GCM clients. This information does not reflect the experience of clients of Clark Capital Management Group, Inc. and is not indicative of future performance. For the periods when the designation was made, the recognition was for the GCM All Cap Core strategy managed by Mr. Soslow. Though the strategy was in the top ten, it was not ranked first in the top ten category for each period.

The PSN All Cap universe is comprised of 356 firms and 509 products. Criteria: The PSN universes were created using the information collected through the PSN investment manager questionnaire and use only gross of fee returns. Mutual fund and commingled fund products are not included in the universe. 2011 recognition: PSN evaluated all large cap core managers for performance and risk over the 10-year period ended December 31, 2011. The top 10 are recognized for their ability to significantly outperform the S&P 500 Index without taking on excess risk, while maintaining a high correlation to the benchmark. Products must have an R-Squared of 0.80 or greater relative to the style benchmark for the 10-year period ending December 31, 2011. Moreover, products must have returns greater than the style benchmark for the 10-year period ending December 31, 2011 and also Standard Deviation less than the style benchmark for the 10-year period ending December 31, 2011. At this point, the top 10 performers for the latest 10-year period ending December 31, 2011 become the PSN Top Guns Manager of the Decade. 2007 recognition: Products must have an R-Squared of 0.80 or greater relative to the style benchmark for a five-year period ending December 31, 2007. Moreover, products must have returns greater than the style benchmark for the three latest three-year rolling periods ending December 31, 2007. At this point, the top 10 performers for the latest three-year period become the 4 STAR TOP GUNS. Products are then selected which have a standard deviation for the five-year period equal or less than the median standard deviation for the peer group. The top 10 performers for the latest three-year period become the 5 STAR TOP GUNS. The top 10 information ratios for the latest five-year period ending December 31, 2007 then become the 6 STAR TOP GUNS. 2006 recognition: Products must have an R-Squared of 0.80 or greater relative to the style benchmark for a five-year period ending September 30, 2006. Moreover, products must have returns greater than the style benchmark for the three latest three-year rolling periods ending September 30, 2006. After that only the products which standard deviation for the five-year period is equal or less than the median standard deviation for the peer group are selected. The top 10 performers for the latest three-year period become the 4 STAR TOP GUNS. The top 10 information ratios for the latest five-year period ending September 30, 2006 then become the 5 STAR TOP GUNS.

CCM-802



One Liberty Place
53rd Floor
1650 Market Street
Philadelphia, PA 19103