

A sailboat with a large, multi-colored sail (orange, blue, and white) is sailing on the ocean under a cloudy sky. The image is semi-transparent, allowing the text to be overlaid.

PARTNER

CONFERENCE

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

Navigate Your Future. Enjoy the Journey.



Firm Profile:

- Philadelphia-based family and employee owned independent asset management firm founded in 1986.
- Over \$11.2 billion¹ in assets under advisement by seasoned and knowledgeable portfolio management and research professionals.
- 18 investment professionals with an average experience of 28 years in the fields of investment and finance.
- Our objective is to provide superior risk-adjusted returns through a process focused on meaningful diversification, risk management, and opportunistic asset allocation.
- Recent recipients of the Investnet and Investment Advisor Strategist of the Year award, PSN Top Guns Manager of the decade, and a 2018 Lipper Award.
- We recognize that success in today's financial environment requires both innovative and traditional investment strategies designed to create wealth and protect capital.

¹ As of 12/31/2017 includes sub-advised assets

Past performance is not indicative of future results. The ranking shown above may not be reflective of any one client's experience because it shows an average of all, or a sample of all, the experiences of an adviser's clients. Please see attached disclosures for additional information.

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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.

ATTENDEES

Ralph Adamo

Integrity Wealth Management
Newport Beach, CA

Ross L. Anderson

Ameriflex Financial Services
Newport Beach, CA

Michael Binswanger

MassMutual Pacific
Walnut Creek, CA

Anthony F. Blair

JW Cole Financial
Phoenix, AZ

Sean M. Burr

Burr Financial
Westlake Village, CA

Denise P. Carcel

AXA
Newport Beach, CA

Paul A. Castagna

Columbus Advisors
San Francisco, CA

Scott A. Chelberg

Retirement Solutions, Inc.
Carlsbad, CA

Austin D. Dean

Pacific Capital Resource Group
Bellevue, WA

Kirk Dobson

David White & Associates
San Ramon, CA

Antonio Dominguez

Sourjohn Kim
Retirement Solutions
San Ramon, CA

Cynthia A. Doussard

Doussard Financial
Burlington, WA

Stephan P. Gabriel

Elektron Financial
Newport Beach, CA

Vickie Garcia

NextBridge Wealth Advisors
Scottsdale, AZ

Mary M. Gies

Gies Associates
Kennewick, WA

Wayne Gilbert

Wayne Gilbert & Company
Santa Barbara, CA

Charlie Haugh

Martin Haugh Financial
Beaverton, OR

David Henderson

MassMutual
San Jose, CA

Chris Herkert

Herkert & Associates Inc
Bellingham, WA

Patrick Herkert

Herkert & Associates, Inc.
Cedarburg, WI

Gregory J. Krpalek

Krpalek Financial Services
Albany, OR

Sara LaClair

Rayhons Financial Solutions
Gilbert, AZ

Lisa Lagorio

LL Financial
Livermore, CA

Natalie Leininger

Leininger Financial Services
Pleasanton, CA

Shawn McElderry

Monarch Wealth &
Retirement Strategies
Woodland Hills, CA

Timothy F. McFall

U.S. Capital Strategies, Inc.
Kirkland, WA

Dallas McKinnon

McKinnon & Associates
Redlands, CA

Daniel Medina

Investors Advantage
Westlake Village, CA

Keith Offel

Stonehaven Financial Group
Fullerton, CA

Barbara K. Orechoff

ICM/SagePoint Financial
Camarillo, CA

Monica Padilla

American Investors Company
Danville, CA

Daintry N. Price

Conover Captial Management
Bellevue, WA

Melissa Shaw-Jones

Jones Associates Financial &
Insurance Services, Inc.
Lake Forest, CA

Scott E. Silverman

State Street Global Advisors
Encinitas, CA

Marli A. Smythe

CUE Financial Group Inc
Phoenix, AZ

Marc Spiegel

FSC Securities Corporation
San Juan Capistrano, CA

Christopher B. Vaccaro

Capstone Financial Group
Folsom, CA

Johnny Vallejo

Stonehaven Financial Group
Fullerton, CA

Brandon S. Wagner

Wagner Financial
Bismarck, ND

Adam J. Wass

LPL
Huntington Beach, CA

Philip Bombace

MassMutual
Foster City, CA

Eric W. Bond

Bond Wealth Management
Long Beach, CA

Michelle Bozza

AssetMark
Encino, CA

Cindy J. Bryant

Momentum Financial Partners
Tempe, AZ

Marty Chiu

VantaQuest
Seal Beach, CA

Adam T. Ciepiela

Charles Stephen and Company
Albuquerque, NM

Jeannine R. Citoli

Stickney Research
Bellevue, WA

Thomas W. Davis, Jr.

Finley Davis Financial Group
Eugene, OR

Scott Elardo

Sagemark Consulting
Irvine, CA

Robert Emmer

Silversage Advisors
Richmond, CA

Brett W. Fallon

Momentum Financial Partners
Tempe, AZ

Monte Fitch

VPAG
Irvine, CA

John L. Grace

Investor Advantage Corp.
Westlake Village, CA

David K. Hansch

Hansch Financial Group
San Juan Capistrano, CA

Walter J. Hansch

Hansch Financial Group
San Diego, CA

Scott T. Harris

Principal Financial Group
Phoenix, AZ

David R. Jernigan

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Partners LLC
Newport Beach, CA

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Jones Associates
Lake Forest, CA

Michael E. Kiefer

Mark J Napolin & Assoc.
Albuquerque, NM

Casey D. Kotter

Integrated Financial Group
Salt Lake City, UT

Christopher J. Lococo

First Street
San Jose, CA

John E. Lococo

First Street
San Jose, CA

Phillip E. Manning

AssetMark
Issaquah, WA

Mark Markland

Markland Wealth Mgmt., Inc.
Manhattan Beach, CA

Rick Montejano

Pacific Point Asset Mgmt
Woodland Hills, CA

Jeffrey Mramor

Pacific Point Asset Management
Woodland Hills, CA

Bryan Nelson

Orion Wealth, Inc.
Turlock, CA

Maurice J. Nollette

Lincoln Investment
Spokane, WA

Christopher A. Riel

David White & Associates
San Ramon, CA

Donovan D. Ritter

Spectrum Capital
Investment Group
Irvine, CA

Stanley B. Secor

Premier Advisors
Salt Lake City, UT

Rischi P. Sharma

Assembly Pointe Financial
San Juan Capistrano, CA

Warren B. Stickney

Stickney Research
Bellevue, WA

Chris Swisher

VantagePoint Advisory Group
Irvine, CA

Christine Tang

Modern Wealth Advisors
Costa Mesa, CA

Tanner C. Tregeagle

Integrated Financial Group
Salt Lake City, UT

Matt Weaver

Fremont Bank
Fremont, CA

Kenneth H. Williams

Williams Financial Advisors, Inc.
San Juan Capistrano, CA

Diane L. Woodward

Oak Tree Wealth Management
San Ramon, CA

Eric Wygant

Bancorp Bank
Philadelphia, PA

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 2000.

*See back cover for disclosure.



Jonathan A. Fiebach
Executive Vice President
Fixed Income



Brett McAvoy
Investment Consultant



Jim Agasar
Investment Consultant



Zack Dukich
Investment Consultant

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 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 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 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

7:45 to 9:00 a.m.

Breakfast

Orchid Terrace

9:00 to 9:15 a.m.

Welcome & Introductions

Conference begins in Bay Laurel Central & South

Brendan M. Clark, CFA®, Chief Executive Officer

Chris Cullen, CIMA®, National Sales Manager

9:15 to 10:05 a.m.

Clark Capital's Investment Philosophy & Process

K. Sean Clark, CFA®, Chief Investment Officer

10:05 to 10:20 a.m.

Break

Approved for
1 hour CFP® CE Credit

10:20 to 11:45 a.m.

Portfolio Panel: Meet the Managers

10:20 to 11:00 a.m. Equity Panel

Maira Thompson, Tony Soslow, CFA®

11:00 to 11:45 a.m. Fixed Income Panel

Jamie Mullen, Steve Grant, CFP®, Jon Fiebach

Moderator: K. Sean Clark, CFA®, Chief Investment Officer

11:45 to 12:45 p.m.

Lunch with the Portfolio Managers

Orchid Terrace

12:45 to 1:15 p.m.

Partner Panel: Hear from Your Peers

Moderator: James Agasar

1:15 to 2:20 p.m.

Tying It All Together

1:15 to 1:30 p.m. Tools to Attract and Retain High Net Worth Clients

Chris Cullen, CIMA®, National Sales Manager

1:30 to 1:55 p.m. Simplifying the Income Planning Conversation

Zack Dukich, Investment Consultant

1:55 to 2:20 p.m. Growing Your Business with the Client Portfolio Management Team

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

2:20 to 2:30 p.m.

Closing Remarks

Chris Cullen, CIMA®, National Sales Manager

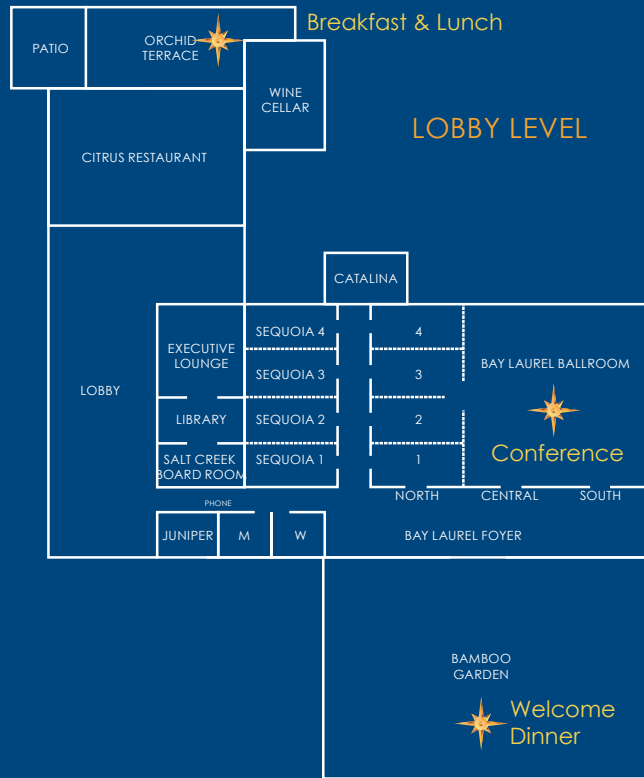
WORKSHEET

Agenda Item	Key Takeaway	Why Is It Important?	First Action
Welcome and Opening Remarks			
Clark Capital's Investment Philosophy & Process			
Portfolio Panel: Meet the Managers			
Lunch with Portfolio Managers			
Partner Panel: Hear from Your Peers			
Tying It All Together: Tools to Attract and Retain High Net Worth Clients			
Simplifying the Income Planning Conversation			
Growing Your Business with the Client Portfolio Management Team			
Closing Remarks			

The One Thing

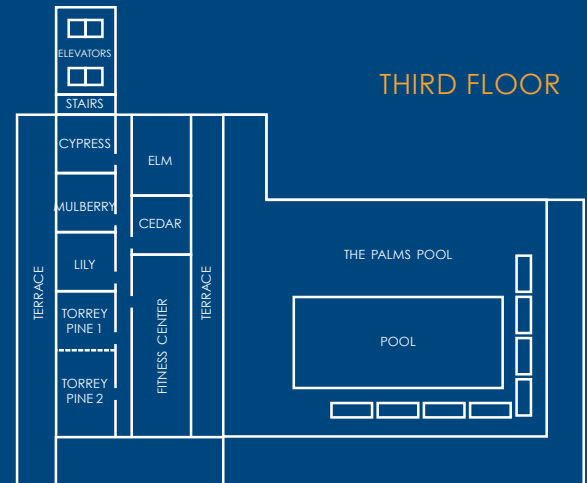
What is the most important thing you got out of today's conference?

Specific Actions



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*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 on the five-year period is equal for less than the median standard deviation for the peer group are selected. The top 10 performers for the latest three-year period became 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.

Past performance is not indicative of future results. The ranking shown above is not indicative of the adviser's future performance and 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 the adviser's clients.

Investnet, Inc. (NYSE: ENV) and Investment Advisor magazine selected finalists for the 13th Annual Separately Managed Account (SMA) Manager and Strategist of the Year Awards using Investnet | PMC's proprietary, systematic, and multi-factor methodology for evaluating managers. This framework takes a variety of qualitative and quantitative criteria into consideration, such as investment process and style, performance, firm profile, customer service, and tax efficiency. To qualify for an SMA Manager and Strategist of the Year Award, a manager's team must have at least three years of experience running a strategy with \$200 million or more in assets. A manager's product is also required to be reported through Investnet | PMC's Premium Research solutions, which includes more than 54,000 advisors and 2,500 companies including: U.S. banks, wealth management and brokerage firms, Registered Investment Advisors, and Internet services companies.

The Thomson Reuters Lipper Fund Awards, granted annually, highlight funds and fund companies that have excelled in delivering consistently strong risk-adjusted performance relative to their peers. The Lipper Fund Awards are based on the Lipper Leader for Consistent Return rating, which is a risk-adjusted performance measure calculated over 36, 60 and 120 months. The fund with the highest Lipper Leader for Consistent Return (Effective Return) value in each eligible classification wins the Lipper Fund Award. For more information, see lipperalpha.financial.thomsonreuters.com/lipper Although Lipper makes reasonable efforts to ensure the accuracy and reliability of the data contained herein, the accuracy is not guaranteed by Lipper.

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