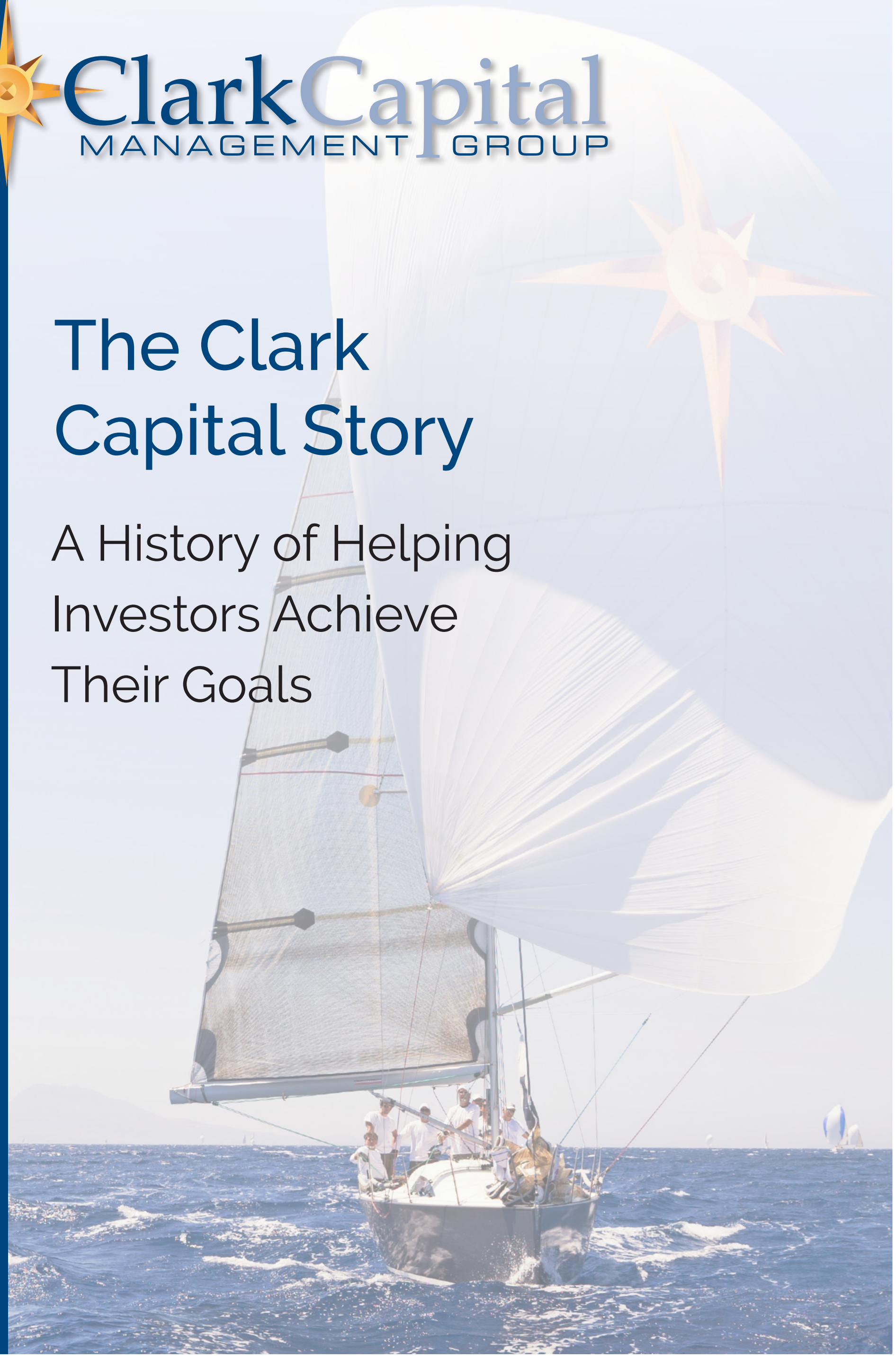
Clark Capital
MANAGEMENT GROUP

The Clark Capital Story

A History of Helping Investors Achieve Their Goals



Navigate Your Future. Enjoy the Journey.

Clark Capital Management Group is a 100% family and employee-owned investment management firm based in Philadelphia, PA.

Together with elite financial advisors, we are dedicated to providing investment strategies designed to help high net worth investors achieve their goals.

"I founded Clark Capital to place investors' needs first."
Harry J. Clark, CFP® | Executive Chairman

We recognize that life is a journey, and we are committed to helping investors move toward their life goals confidently.

Clark Capital partners with financial advisors to deliver investment strategies that are aligned with their financial plans for their clients.

As an independent asset manager, we offer a true partnership to financial advisors and their clients. We believe that a collaborative approach to portfolio construction helps ensure that clients achieve their desired outcomes.

Our diversified suite of investment strategies is designed to address a full range of investor goals: growth, income, and capital preservation.

A history of helping elite financial advisors and their clients

1986
Harry Clark Founds Clark Capital to Provide Investors with Unbiased Access to Fee Based Investment Management

2000
Navigator® Taxable and Tax Free Fixed Income Individual Bond Portfolios Are Launched

2005
Navigator® Fixed Income Total Return, an Innovative, Relative Strength-Based Approach to Tactical Fixed Income Is Launched

2005
Navigator® High Dividend Equity Separately Managed Account Is Launched

Our Investment Philosophy

Whether you seek growth, income or protection, we collaborate with your financial advisor to create the right portfolio for your unique needs.

Our disciplined and research-driven investment philosophy is grounded in three core principles:

Meaningful Diversification

Multiple global asset classes and methodologies are incorporated into a portfolio aligned to the client's life goals.

Opportunistic Asset Allocation

We utilize an active approach to take advantage of growth opportunities in a rapidly changing global marketplace.

Personalized Risk Management

Help clients remain committed to reaching their long-term goals, regardless of the ups and downs of the market.

2006

RTE Asset Management ("RTE") Is Acquired as a Wholly Owned Subsidiary

2007

Navigator® Unified Managed Account (UMA) Strategies Are Launched

2014

Navigator® Personalized Unified Managed Account (PUMA®) Is Launched, Providing Complete Personalization for High Net Worth Investors

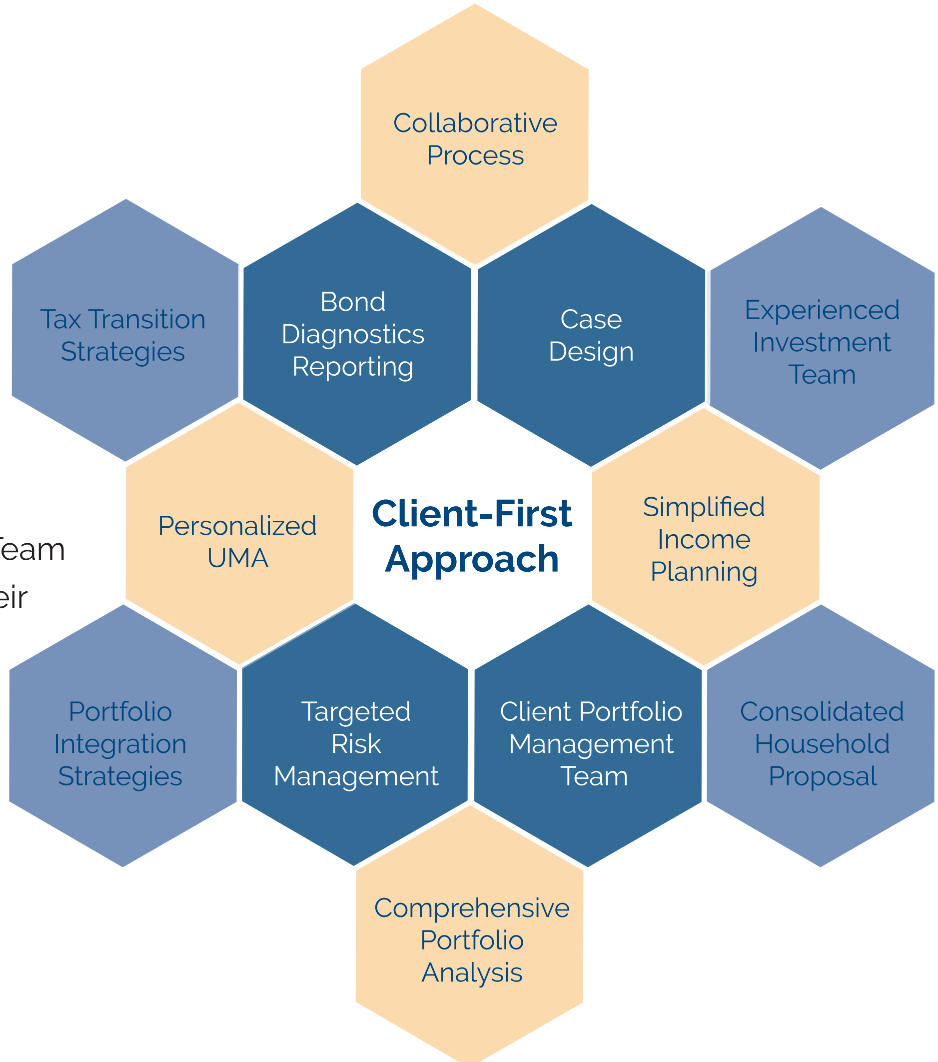
2015

The Firm Enters a Distribution Agreement with AssetMark to Begin Its Next Phase of Growth Focused on Asset Management Excellence

Putting Clients First

We believe putting clients at the center of portfolio construction can help investors remain committed to their financial plan so they can reach their long-term goals.

Our Client Portfolio Management Team works together with clients and their financial advisors to understand each client's life goals and creates personalized portfolios, tax plans and income plans tailored to their objectives.



2016
The Client Portfolio Management Team Is Formed to Expand the Firm's High-net-worth Services for Advisors and Investors

2017
Brendan Clark, CFA® Is Named Chief Executive Officer

2017
Clark Capital Is Named SMA Strategist of the Year by Envestnet, Inc and Investment Advisor Magazine

2017
Firm Provides Ownership to All Employees Strengthening Its Commitment to Being a Family and Employee-Owned Independent Asset Manager

“Asset management is a team sport.”
Brendan Clark, CFA® | Chief Executive Officer

Our People

The strategies we offer are only one part of our story, and we believe the key to success is the people involved.

Our team is dedicated to providing innovative investment strategies with a common goal: to help deliver consistent, long-term investment performance.

A Culture of Care

Clark Capital’s culture is driven by our family and employee-owned atmosphere.

Our culture of care strives to make positive impacts, with the goal of leaving behind a business legacy that extends beyond investment returns.

2018
Navigator® International/ADR Is Recognized as Manager of the Decade by PSN/Informa

2019
Navigator® Total Wealth Strategies Are Launched Providing Fully Diversified, Risk-Based Portfolios for High Net Worth Investors

2020
Clark Capital Is Recognized by MMI/Barron’s for Asset Manager of the Year ($10-50b) and for Distribution Excellence

2020
Firm Becomes the 15th Largest SMA Manager, Reaching over $20b in Assets under Management

A Commitment to Asset Management Excellence

Clark Capital is honored to be recognized by leading industry publications and institutions for our dedication to serving advisors and their clients.

2020 2021 2022 INDUSTRY AWARDS WINNER | Money Management Institute | BARRON'S | Asset Manager of the Year *(AUM between $25-$100 billion)*

2021 WINNER REFINITIV LIPPER FUND AWARDS UNITED STATES

2020 WINNER REFINITIV LIPPER FUND AWARDS UNITED STATES

2018 THOMSON REUTERS LIPPER FUND AWARDS UNITED STATES

2022 BEST PLACES TO WORK PHILADELPHIA BUSINESS JOURNAL

2021 BEST PLACES TO WORK PHILADELPHIA BUSINESS JOURNAL

2017 SMA MANAGERS of the YEAR

Informa Investment Solutions PSN Top Guns Award Manager of the Decade 4Q 2018

Informa Investment Solutions PSN Top Guns Award Manager of the Decade 4Q 2017

2020 BEST PLACES TO WORK PHILADELPHIA BUSINESS JOURNAL

2019 BEST PLACES TO WORK PHILADELPHIA BUSINESS JOURNAL

2021
Clark Capital Is Recognized by MMI/Barron's for Asset Manager of the Year ($10-50b)

2022
Clark Capital Is Recognized by MMI/Barron's for Asset Manager of the Year ($25-100b) and for Distribution Excellence

2022
Clark Capital Wins Philadelphia Business Journal's Best Places to Work in Philadelphia for the 4th Year in a Row

Contact your financial advisor to learn how Clark Capital can help you achieve your investment goals.

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