

1 Hour  
CFP® CE Credit



Glenn Dorsey, CFA®, CAIA®  
Senior Vice President,  
>Head of Client Portfolio Management

Glenn Dorsey is Senior Vice President, Head of Client Portfolio Management 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.

During Glenn's extensive experience as a Client Portfolio Manager, he has focused on helping advisors deliver great outcomes to their clients. 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.

A Chartered Financial Analyst® and Chartered Alternative Investment Analyst®, Glenn holds a bachelor's degree in finance and accounting from Rider University in Lawrenceville, New Jersey.

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# You're Invited!

Lunch with Clark Capital's Glenn Dorsey

## Approved for CFP® CE!

On Wednesday, November 9, 2022, at 11:00 AM, Glenn Dorsey, CFA®, CAIA®, Senior Vice President, Head of Client Portfolio Management, will present Clark Capital's Third Quarter Review to prepare you for conversations with your clients about the markets and their investments.

### Attend This Meeting to Get:

- An economic & capital market review for the third quarter — Approved for one hour of CFP® CE
- A review of how Clark Capital's strategies performed
- An overview of the capabilities of Clark Capital's Client Portfolio Managers and how they can help you grow your business

## Meeting Details

Your Host: Ryan Kenney, CIMA®, AIF®  
Date: Wednesday, November 9, 2022  
Time: 11:00 AM to 12:00 PM Eastern Time  
Location:

Seating at this event is extremely limited.

Please reserve your spot today by calling Fran Hatton at 215.618.8143 or via email at [fhatton@ccmg.com](mailto:fhatton@ccmg.com). Please include the date and location of the event in your response.



