Navigator® Elite Advisor Program

High Net Worth Services to Help You Deliver A Superior Client Experience

Clark Capital's Client Portfolio Management (CPM) Team works side-by-side with Portfolio Managers and Investment Consultants to help you grow your business and clearly communicate the investment expertise you provide to your high net worth clients.

Benefits to You

Sophisticated Presentations with Compelling Analytics

Advanced Investment Planning Strategies

Concierge Level Portfolio Oversight

	Client Household Account Value			
Services Available to You and Your Clients	**$500,000 to $1 Million**	**Over $1 Million**	**Over $5 Million**	**Over $10 Million**
Current Holdings Analysis and Bond Diagnostics with Recommendations	✓	✓	✓	✓
Current Portfolio Cost Analysis	✓	✓	✓	✓
Personalized Investment Proposal	✓	✓	✓	✓
Proposal Review with Your Investment Consultant Team	✓	✓	✓	✓
Institutional Level Investment Proposal		✓	✓	✓
Quarterly Portfolio Reviews by Phone with a CFA-Level Client Portfolio Manager		✓	✓	✓
In-Person Access to the Head of Your CPM Team				✓
Access to Portfolio Management Leaders at Clark Capital				✓
In-Person Access to Trust and Estate Planning Services with a Senior Wealth Planner				✓

	Navigator® Elite Advisor Program (AUM with Clark Capital)		
A Long-Term Partnership to Help You Grow Your High Net Worth Business	**Silver** **$10 million**	**Gold** **$25 million**	**Platinum** **$50 million**
Annual Book Review with the Head of Your CPM Team	✓	✓	✓
Quarterly Client Economic and Capital Market Review Group Call	✓	✓	✓
Monthly Market Recap of Investment Team Insights	✓	✓	✓
Access to Behavioral Finance Coaching		✓	✓
Quarterly Portfolio Reviews by Phone with the Head of Your CPM Team		✓	✓
Annual In-person Event with the Head of Your CPM Team		✓	
Annual In-person Event with Glenn Dorsey, Head of Client Portfolio Management			✓

Navigator® Elite Advisor Program

The Navigator® Elite Advisor Program is designed to provide tools and resources to help you grow and retain your high net worth business.

As your assets under management with Clark Capital grow, you'll have access to a wide range of exclusive concierge-level services from our CPM Team.

For more information, contact your Investment Consultant