

1 Hour
CFP® CE Credit



Tom Duffy, CFA®
Client Portfolio Manager

Thomas joined Clark Capital in 2019 and is a member of the firm's Client Portfolio Management Team. In collaboration with financial advisors and Clark Capital's Investment Consultants, he constructs highly personalized investment solutions for high net worth clients. Thomas works with elite financial advisors in providing an elevated investment experience delivered with a level of concierge service that high net worth individuals expect.

Thomas began his career in the investment industry in 2000 with Datek Online and spent the majority of his career at Merrill Lynch and BlackRock. Thomas is a graduate of Marywood University and holds a Post-Baccalaureate Certificate from The Wharton School of the University of Pennsylvania. He is a Chartered Financial Analyst® (CFA®) charterholder and a member of the CFA® Institute and CFA® Society Philadelphia. Thomas holds FINRA Series 7, 63, and 65 licenses.

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You're Invited!

Webinar with Clark Capital's Tom Duffy

Approved for CFP® CE!

On Wednesday, July 26, 2023, at 11:00 AM, Tom Duffy, CFA®, Client Portfolio Manager, will present Clark Capital's Second Quarter Review to prepare you for conversations with your clients about the markets and their investments.

Attend This Webinar to Get:

- An economic & capital market review for the second 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

Webinar Details

Your Host(s): Greg Morel

Date: Wednesday, July 26, 2023

Time: 11:00 AM to 12:00 PM Eastern Time

Click the Link Below to Register

<https://ccmg.zoom.us/meeting/register/tZlvdu-upzIqG9USLj8PIUgmtg6wZeACR6YC>

If you have questions or technical issues, contact Krissy Millar at 215.618.8153 or via email at kmillar@ccmg.com. Please include the date of the event in your response.

