Scaling Your Practice with A.I. and Clark Capital

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Agenda

- The Evolution of Financial Professionals
- The Time Challenge
- Discovering Generative A.I. (Artificial Intelligence)
  - Chat GPT, Bard, Claude, etc.
- Proven Methods to Scale Your Practice with A.I. and CCMG
- Clark Capital Strategies & Services
  - Total Wealth Strategies, Multi-Strategies, Global Risk Management
  - Partnering with Clark in 5 easy steps
  - Wealth Management

You Are the CEO

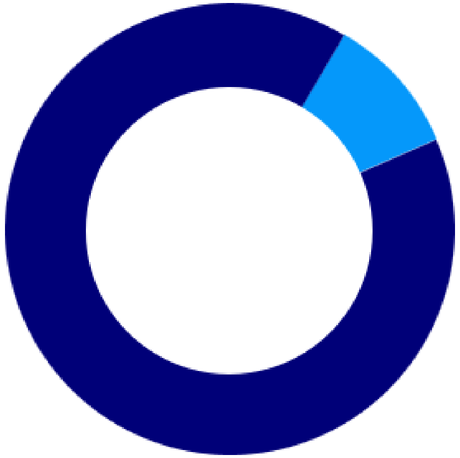
Source: Invesco Global Consulting

The Time Challenge

How financial professionals spend their days

Client meetings	21%
Investment research, due diligence, monitoring	12%
Prep for client meetings	10%
Managing day-to-day operations and admin	10%
Financial planning	9%
Trading and rebalancing	9%
Practice management	8%
Client service issues	8%
Prospecting new clients	8%
Compliance	4%
Other	1%

How portfolio managers spend their days



Portfolio management, investment research, due diligence	90%
Client meetings/ Marketing	10%

Source: Cerulli Associates, The Cerulli Report: U.S. Advisor Metrics 2021.

The Time Challenge

Source: Invesco Global Consulting

ChatGPT

What Is Chat GPT?

- ChatGPT is a computer program powered by advanced artificial intelligence. It's designed to have text-based conversations with users and provide helpful responses, similar to chatting with a human. You can ask it questions, get information, discuss various topics, and more, all through written text. It uses a vast amount of knowledge from the internet to generate its responses, but it doesn't have its own thoughts or consciousness; it's just a tool for generating text based on the input it receives. — ChatGPT
- In a survey of all 500 of the Fortune 500 CEOs, 81% agreed that A.I. is extremely important to their companies' future — Forbes
- McKinsey's latest research estimates that generatative A.I. could add the equivalent of $2.6 to $4.4 trillion annually on the global economy — McKinsey

Disclaimer:

1. Consult with your compliance department applicable ways to implement A.I.
2. Data is through September 2021.
3. I am proficient, not an expert.

Source: Forbes McKinsey

Using Chat GPT in your Practice

- Business Development
- Client Service
- Practice Management
- Wealth Management

Conclusion

- You are the CEO
- Generative A.I. could be the most transformative piece of technology we see in our careers
- Generative A.I. and Clark Capital can allow you to create time to allocate to the most important areas in business or life
- Generative A.I. is either your business partner or silent business competitor

Who Is Clark Capital?

1986 Year Founded	$37.3B AUA*	24 Investment Professionals
100% Family and Employee Owned	**Committed to Asset Management Excellence for Better Outcomes**	23.1 Investment Team Average Years Experience
146 Employees	3x Winner **2020-2021-2022** Asset Manager of the Year**	10.1 Investment Team Average Years Working Together

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

Money Management Institute and Barron's selected finalists for both Asset Manager of the Year ($10 –$50 billion) and Distribution Excellence by the specially appointed MMI Industry Awards Steering Council and the MMI Membership Experience Committee (MEC). Award winners were determined by a vote of primary contacts at each member firm. These individuals received an online ballot to cast their votes among the finalists. These awards are not indicative of Clark Capital's future performance nor may it be representative of any one client's experience.

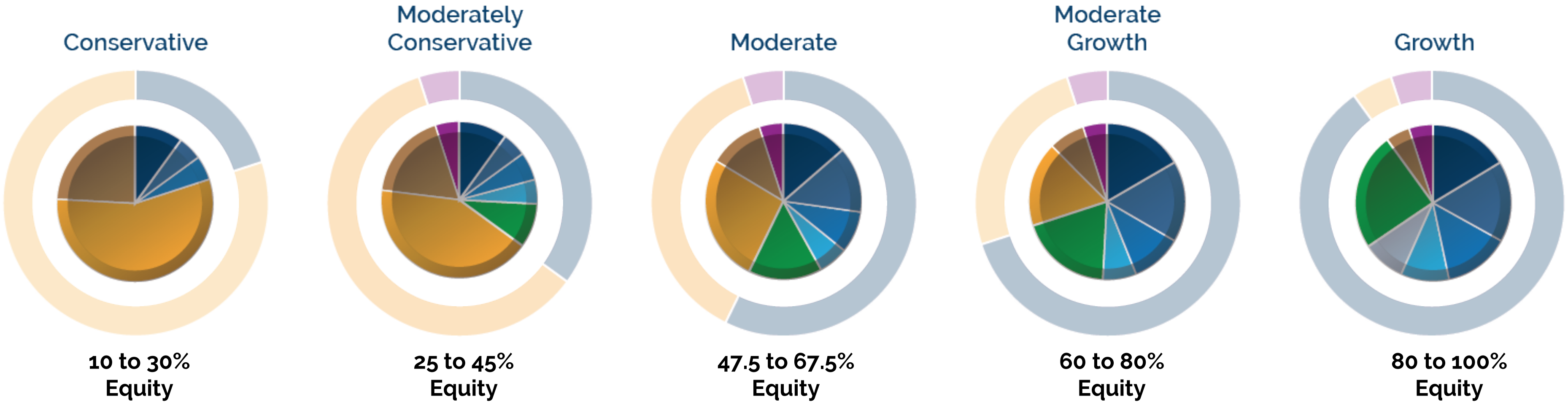
*As of 6/30/2024, includes sub-advised assets and assets under advisement. **Money Management Institute (MMI) and Barron's

Total Wealth Strategies Overview

Navigator® Total Wealth Strategies are actively managed by our experienced team of portfolio managers. Each allocation is fully diversified, combining multiple strategies, investment approaches, and asset classes into a single account.

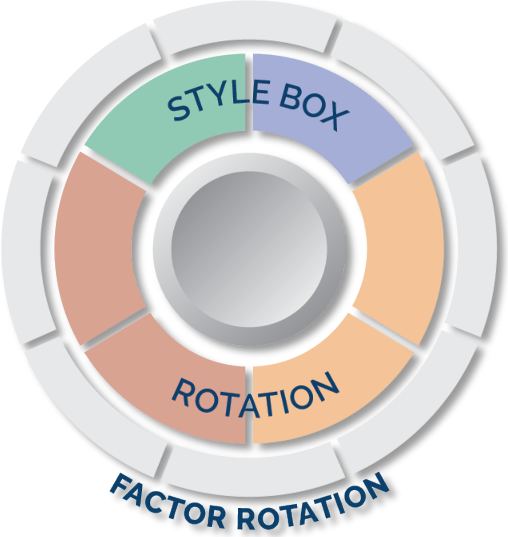
These strategies are designed to help enhance and protect client wealth, so they can stay on track to achieve their unique goals and objectives.

- Offered across five risk-based allocation profiles and tax aware formats
- Minimums begin at $500,000
- Comprised primarily of individual equity and fixed income securities, whenever possible
- Combines approximately 4-10 fundamental and quantitatively-driven strategies into each risk-profile
- Dynamic asset allocation driven by our market outlook



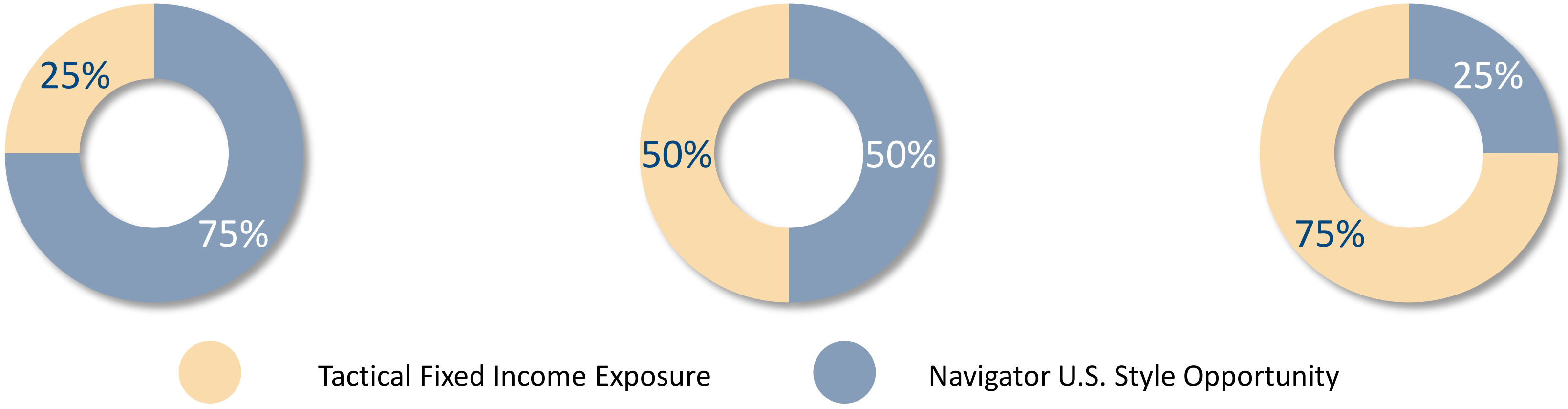
MultiStrategy Portfolios

U.S. Style Opportunity



Tactical Fixed Income Fund (NTBIX)

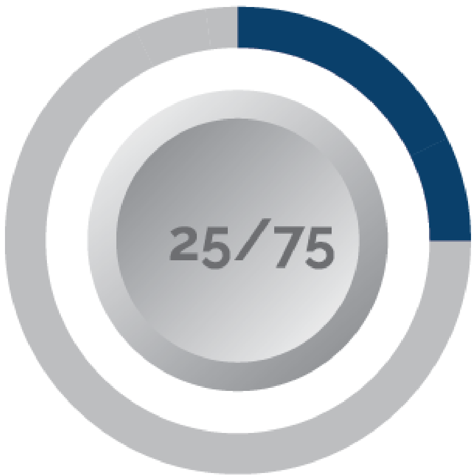
A Combined,
Fully Diversified
Relative Strength
Approach



Navigator®
Global Risk Management Strategies

- Three risk-based strategies

CONSERVATIVE

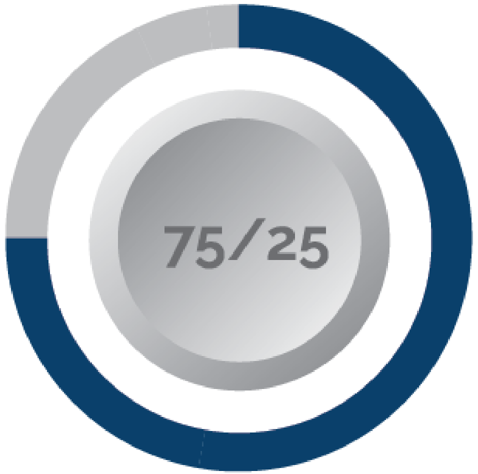


25% Global Equity 75% Fixed Income

MODERATE

50% Global Equity 50% Fixed Income

GROWTH



75% Global Equity 25% Fixed Income

Partnering with Clark Capital in **5 Easy Steps**

1 Case Design Consultation

- Review your prospective client's current financial picture with your Investment Consultant
- Assess your prospective client's goals and objectives
- Identify the purpose of the assets under consideration and develop an investment plan and income plan that support your financial plan

2 Portfolio Analysis from CFA® Charterholders*

- Consolidated, comprehensive report detailing holdings analysis, diversification analysis, and any other relevant information, including tax management and liquidity planning
- In-depth Factset, Morningstar and Personal Fund mutual fund expense reporting
- Custom tax transition plan that seeks to ensure a smooth transition of assets

3 Point of Sale Support*

- Your Investment Consultant Team will meet high net worth prospects with you to discuss the Case Design, Portfolio Analysis, and the corresponding Clark Capital recommendations

4 Concierge Level Education & Resources

- Ongoing investment expertise and white glove service from your Investment Consultant Team to keep you up to date on portfolio construction insights and strategy updates
- Timely commentary, webinars, and events to support your conversations with clients and prospects

5 Quarterly Client Reviews with Your Dedicated Client Portfolio Manager*

- Straightforward review of portfolio performance and detailed market outlooks with you and your client
- Address any changes to the client's long-term financial goals or risk tolerance levels
- Uncover opportunities to expand the client relationship

*Available for Accounts $1m+

ClarkCapital MANAGEMENT GROUP

Wealth Planning: Services Overview

Clark Capital's wealth planning capabilities are designed to help you grow your business and enhance the high net worth experience you provide to your clients. Full access to our suite of comprehensive wealth planning services is available to client households exceeding $10 million, at no additional cost to the advisor and client.

Trust and Estate Planning

We work collaboratively with clients' legal and tax advisors to create and implement effective wealth transfer strategies that are aligned with their clients' goals.

Strategic Tax Planning

By strategically managing their tax liabilities, clients can help reduce their current and future tax burdens, while preserving and growing their wealth.

Concentrated Position Planning

Our team provides personalized guidance to financial advisors and their clients on issues related to both public and private concentration in equity positions. We help develop strategies for asset location, diversification, leveraging charitable giving, and liquidity management to manage risks associated with concentrated positions.

Philanthropic Planning

We help clients develop a personalized strategy that aligns with their values and helps maximize their impact. Our team leverages expertise in a broad range of philanthropic vehicles, such as donor-advised funds, private foundations, and charitable trusts, to help clients achieve their philanthropic goals.

Business Succession Planning

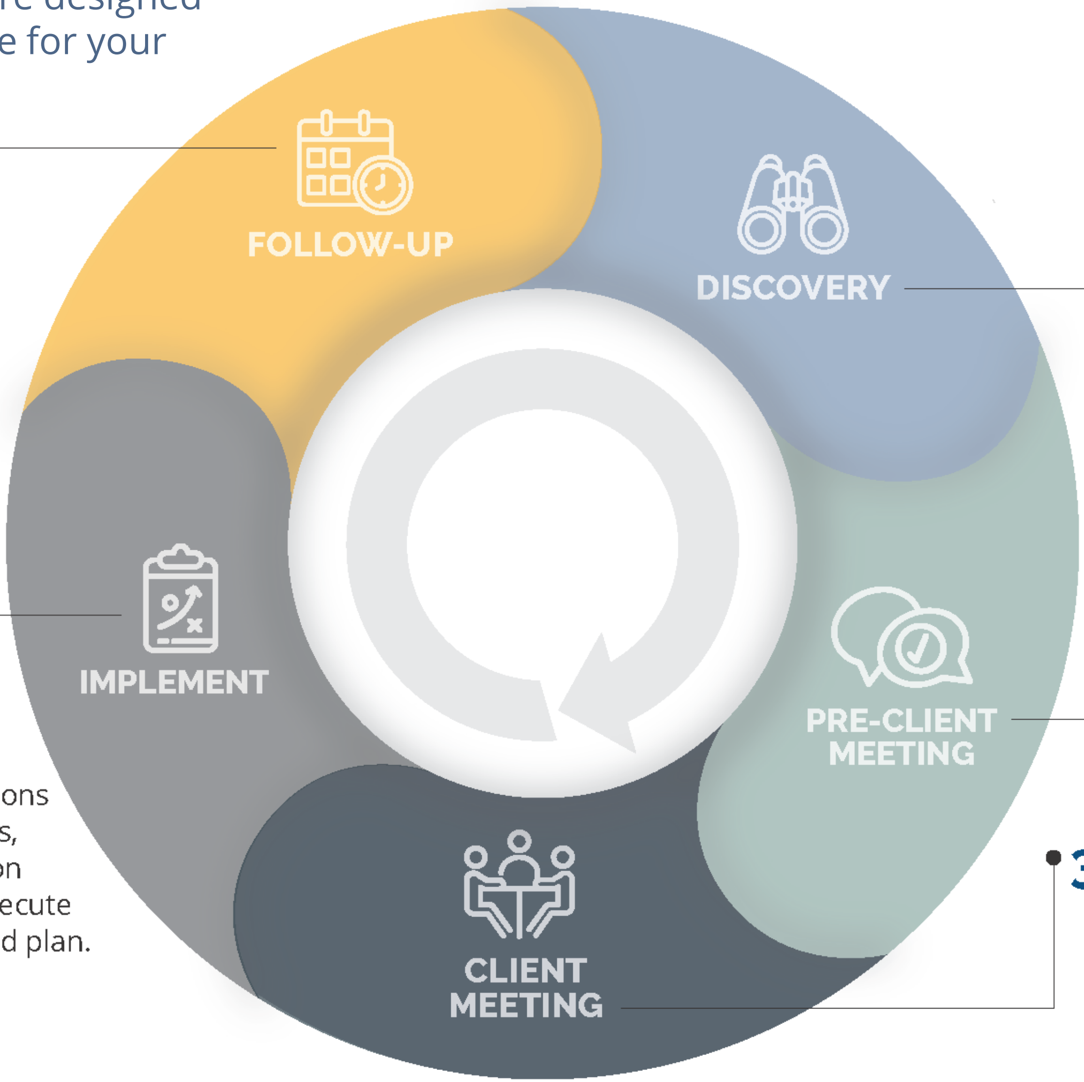
Our team helps clients navigate the complex process of business succession planning,

Equity Compensation Planning

Our team helps clients navigate the complexities of equity compensation.

Advanced Wealth Planning

Clark Capital's wealth planning services are designed to help you provide a superior experience for your high net worth clients.



1 Your Investment Consultant Team will work closely with you to assess your client's wealth planning needs.

2 Meet with your Investment Consultant and Senior Wealth Planner to discuss your client's financial goals and uncover wealth planning challenges in more detail.

3 Client meeting with you, your Senior Wealth Planner, and Investment Consultant Team.

4 Personalized wealth planning recommendations and detailed instructions, including implementation timelines to help you execute your client's personalized plan.

5 Repeat the meeting process as necessary, making adjustments and additional recommendations based on the client's evolving needs and circumstances.

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