

Clark Capital

How We Help Peachtree
Planning Advisors to Potentially
Attract and Retain HNW Clients

Trevor Burlison, CFP®

Investment Consultant GA/SC/NC





Agenda

- Give you an Overview of Clark Capital's High-Net-Worth capabilities through Peachtree Planning
- Provide context on the opportunity at hand with HNW clients to potentially grow Advisor's advisory practice
- Provide you with tools and resources that may help you attract and retain high-net-worth clients.



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.

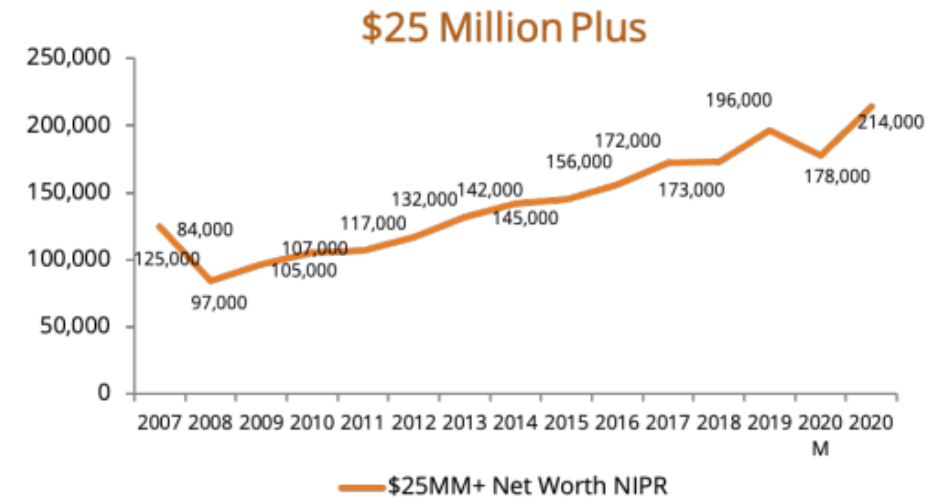
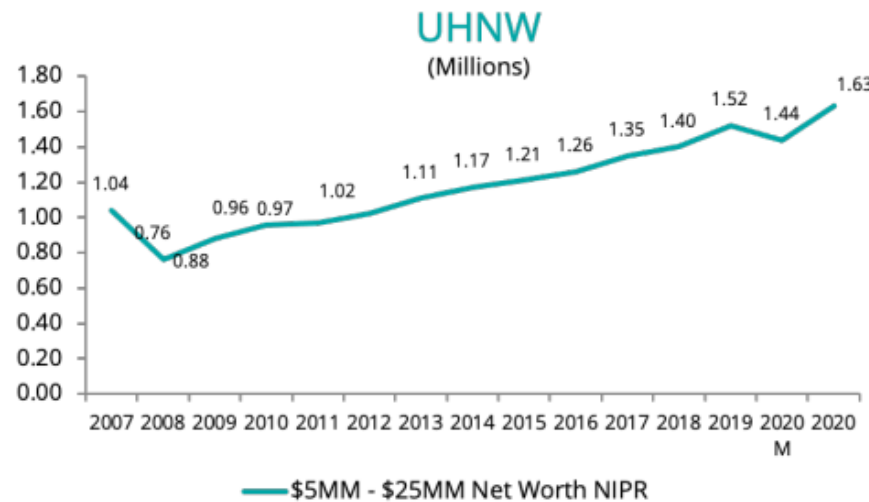
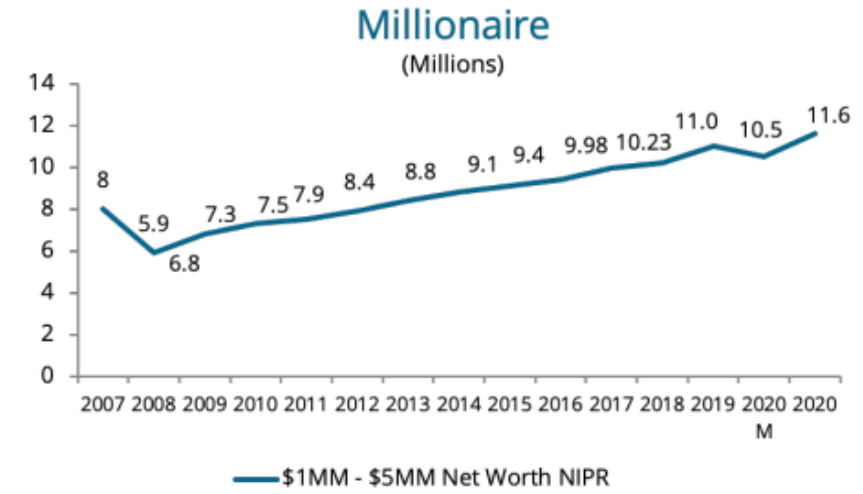
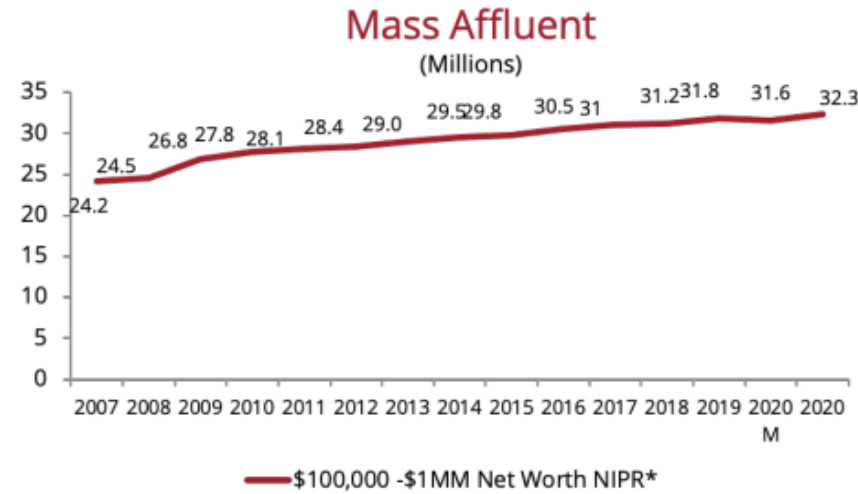
*As of 6/30/2024, includes sub-advised assets and assets under advisement. **Money Management Institute (MMI) and Barron's

Uncovering the High-Net-Worth Opportunity

The High-Net-Worth Opportunity

Wealthy Households in the United States

2007 - 2021



© Spectrem Group 2020

*NIPR - not including primary residence

*M - March



Money In Motion

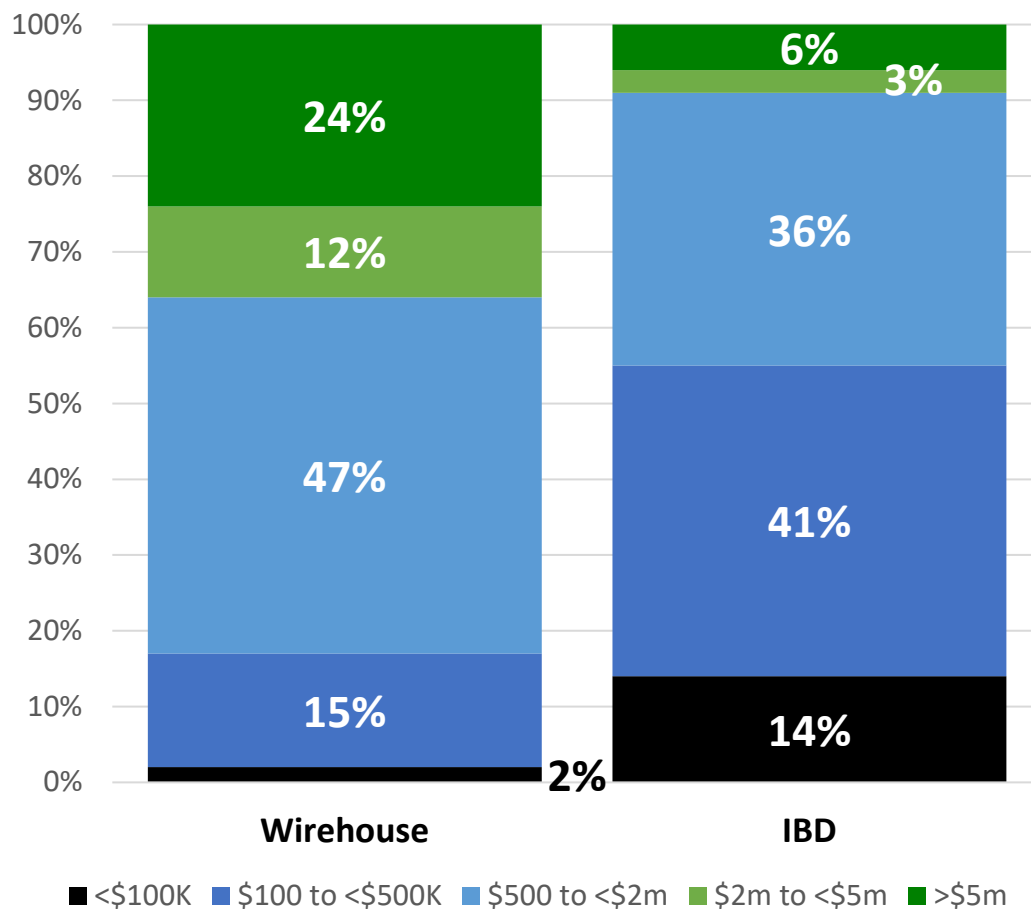
- 39% of UHNW and 27% of HNW clients had plans to switch wealth management providers between 2019 and 2021¹.
- There are 30 million mass affluent households in the U.S. (\$100k-\$1m)².
- Searches for the term “financial advisor” almost doubled in early 2020 compared to 2019 rates, according to Google Trends. Hit record in July 2022.





Wirehouses Retain the Largest Share

Wirehouses retain the largest share of advisor practices oriented toward HNWI and UHNWI investors, fueling high rates of advisor productivity



- HNWI households represent just 1.3% of the total population, but control 43% of total investable assets
- Average wirehouse advisor managed \$175 million in client assets at the end of 2019, 124% more than the industry average of \$77.9 million
- Wirehouse advisors identify access to services relevant to HNWI investors as the top advantage of affiliating with their firm
- Wirehouse advisors are the most aggressive at pruning their client base (asking a client to leave, etc.)

Analyst Note: Cerulli assigns each advisory practice a core market range based on the investable assets of the majority of the practice's client relationships. Advisors are excluded from core market exhibits if Cerulli deems them generalists not focusing on a specific core market.






What High Net Worth Investors Want

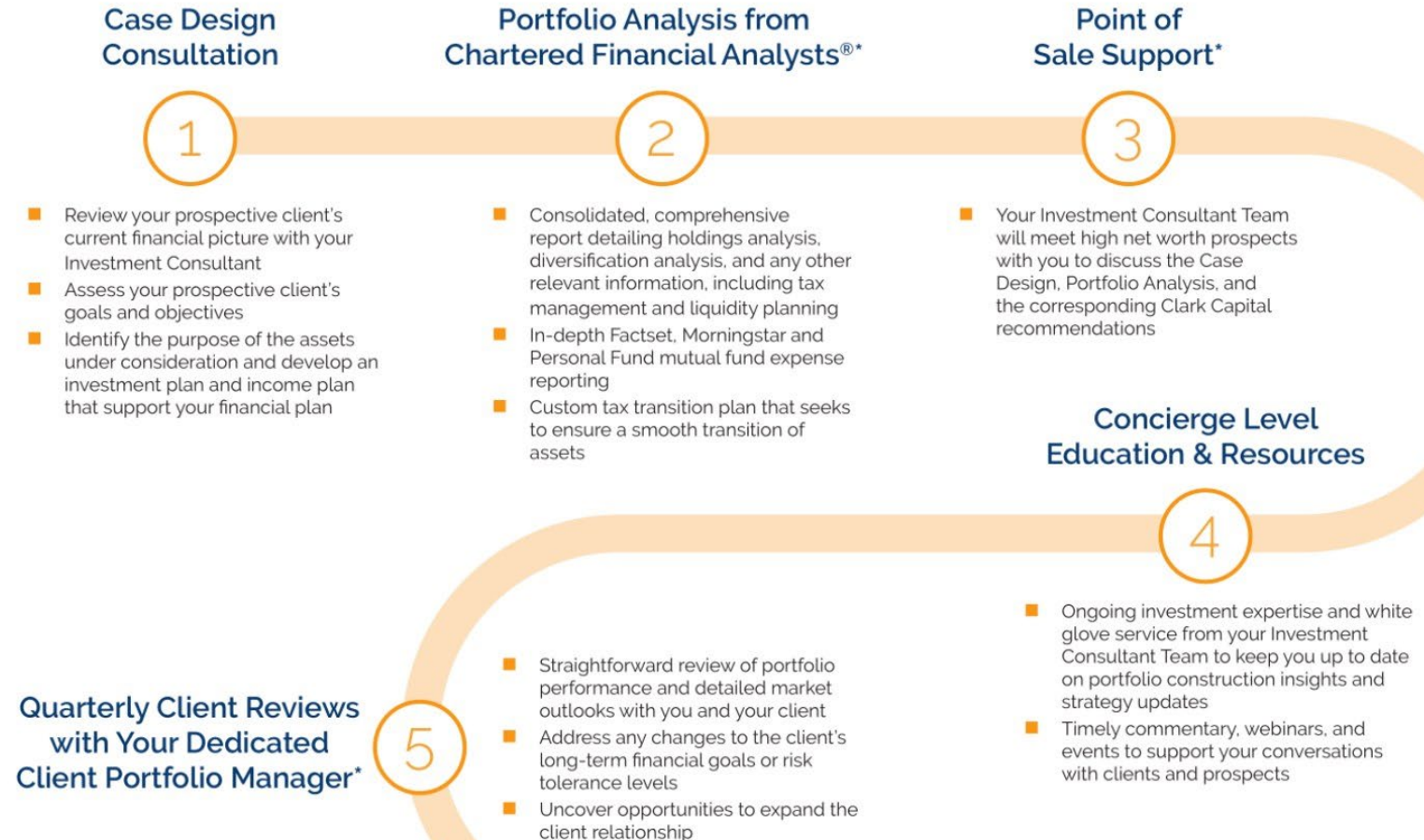
- An investment portfolio that addresses their unique needs and goals
- Concierge-level service; focus on value delivery
- High frequency of communication
- A trusted advisory relationship with real people
 - Only 6% are comfortable with digital-only model
- A holistic, comprehensive wealth management experience



Tools, Resources,
& Strategies to
 Potentially Attract,
Earn, and Retain
HNW Clients

Partnering with Clark Capital in 5 Easy Steps

Contact your Investment Consultant to
discuss a client or prospect: 800.766.2264



*Available for Accounts \$1m+

Clark Capital is an investment adviser registered with the U.S. Securities and Exchange Commission. Registration does not imply a certain level of skill or training. More information about Clark Capital's investment advisory services can be found in its Form ADV Part 2, which is available upon request.



Personal Income Plan

Charting Your Financial Course throughout Your Retirement

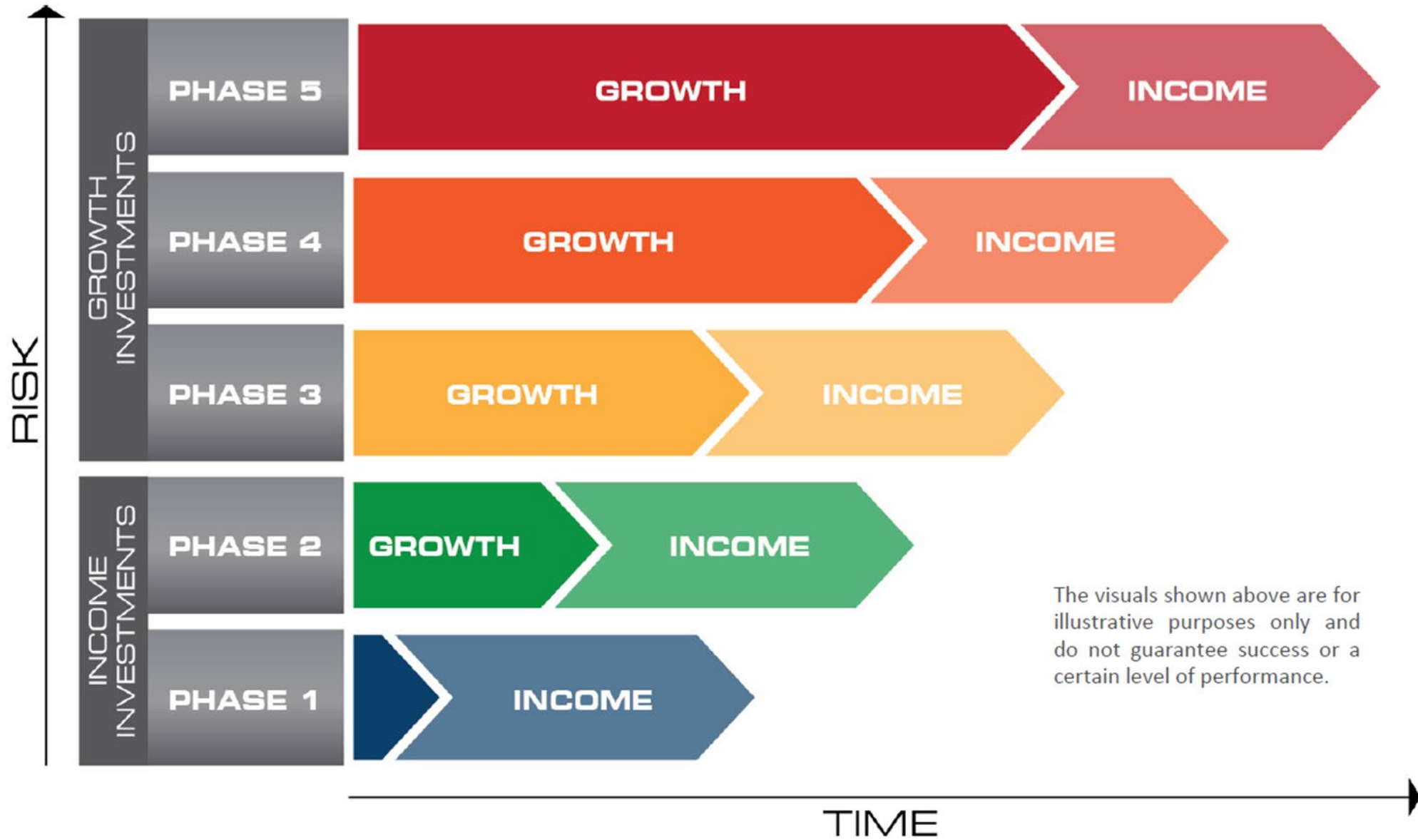
For one-on-one presentation between financial advisor and their client

Prepared exclusively for
John and Jane Smith

On Behalf of
Your Name Here
Your Firm Name Here

Your Logo
Here





The visuals shown above are for illustrative purposes only and do not guarantee success or a certain level of performance.



Navigate
Your Future.

Enjoy the
Journey.

Client	Spouse
John Smith	Jane Smith
Income Start Age	Income Start Age
65	65

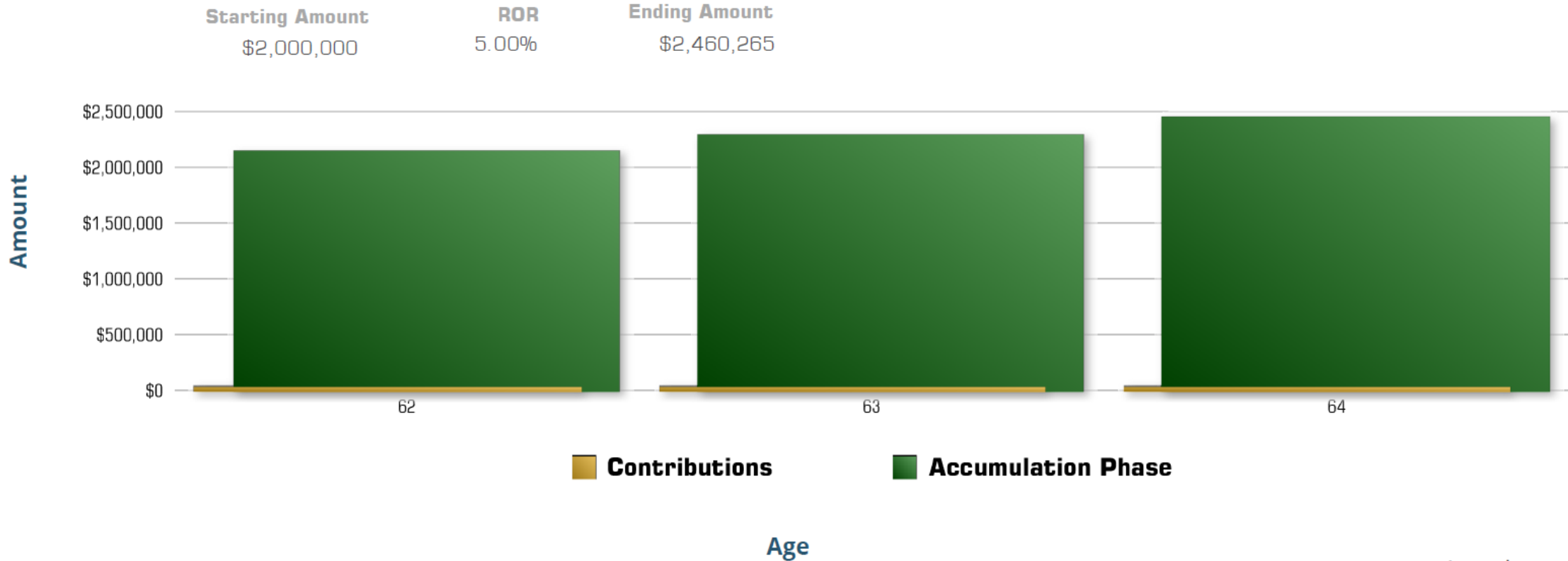
PLAN SUMMARY

Plan Duration (Years)	Inflation Assumption
30	3.00%
Income Needed (Year One)	Investable Assets
\$144,000.00	\$2,460,264.98

ACCUMULATION PHASE

Duration (Years)	ROR	Starting Amount
3	5.00%	\$2,000,000.00



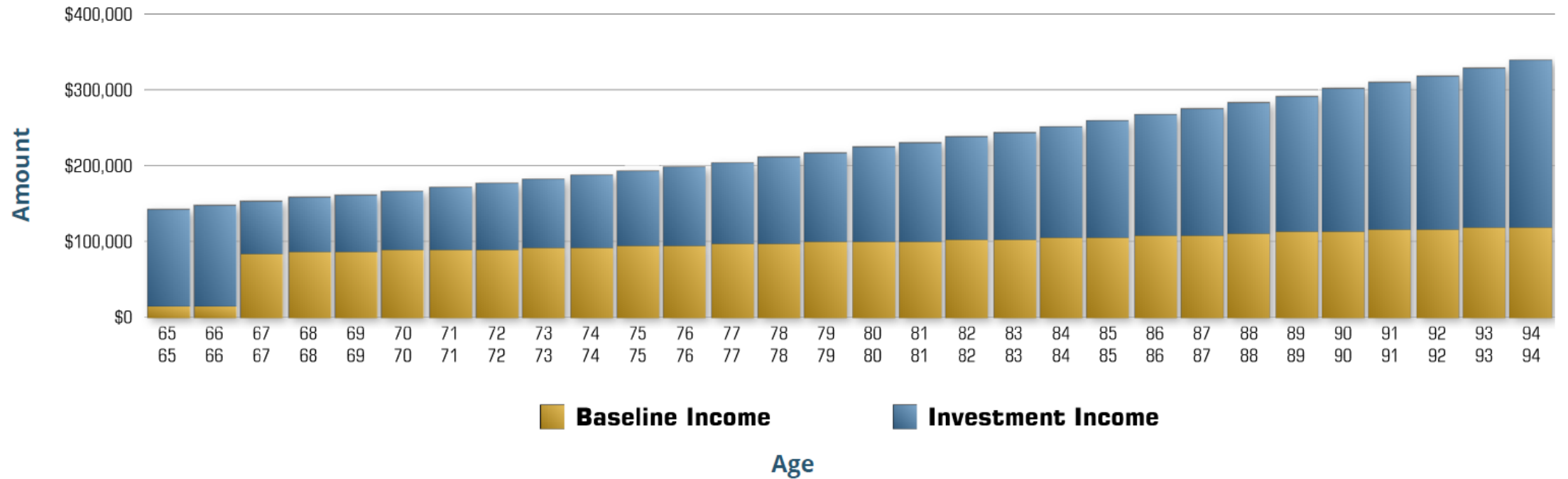


Start Year	End Year	Income Source	Contribution	Annual Increase
1	3	John 401k Contribution	\$23,000.00	
1	3	Jane 401k Contribution	\$23,000.00	

It should not be assumed that any of the investment recommendations or decisions Clark Capital Management Group makes in the future will be profitable or equal to the investment performance discussed herein.

This chart shows an estimate of how much your income will grow over time based on regular contributions (as applicable) and investment income for the time period shown at an assumed rate of return, compounded annually and assuming the inflation rate shown. Information about the rate of return shown can be found in the end disclosures. Slight adjustments to any of these variables can affect the outcome. This graph is for illustrative purposes only.



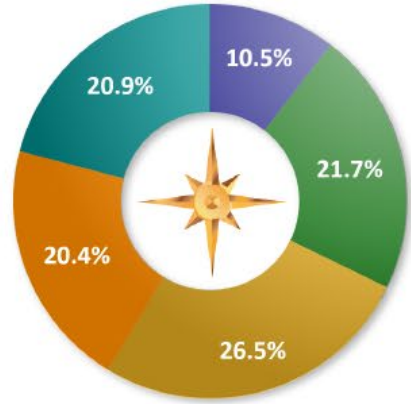


Start Year	End Year	Income Source	Contribution	Annual Increase
3	30	John Social Security	\$35,000.00	1.50%
3	30	Jane Social Security	\$35,000.00	1.50%
1	30	Cornerstone Annuity Income	\$15,000.00	

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Total Investment
\$2,460,264.98

	Phase 1	Phase 2	Phase 3	Phase 4	Legacy
Amount Invested	\$258,416	\$533,753	\$652,186	\$501,354	\$514,555
Total Duration	Year 1 to 2	Year 3 to 10	Year 11 to 20	Year 21 to 30	Year 30
Accumulation Phase ROR	N/A	4.00%	5.00%	6.00%	6.00%
Distribution Phase ROR	1.00%	2.50%	2.50%	2.50%	
Deferral Duration	0 Yrs.	2 Yrs.	10 Yrs.	20 Yrs.	30 Yrs.

Please refer to end of this presentation for important disclosures and detailed description of the methodology used.



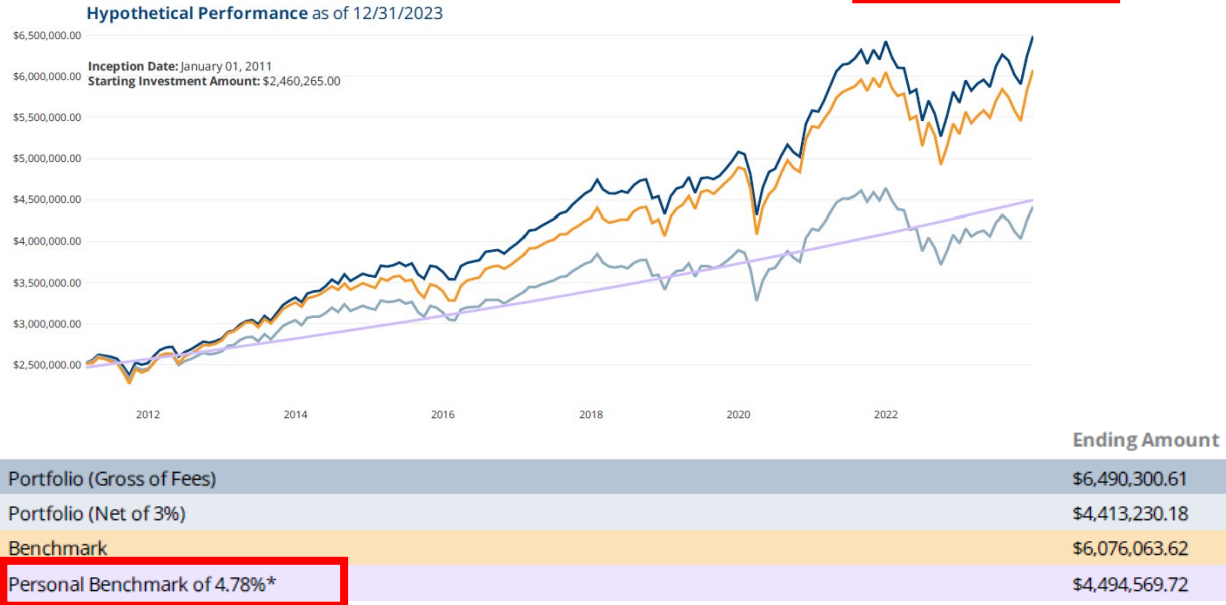
Starting Amount	Phase 1	Phase 2	Phase 3	Phase 4	Legacy
\$258,416	\$258,416	\$533,753	\$652,186	\$501,354	\$514,555
Starting Percentage	10.50%	21.69%	26.51%	20.38%	20.91%
Accumulation Phase Rate of Return	0.00%	4.00%	5.00%	6.00%	6.00%
Distribution Phase Rate of Return	1.00%	2.50%	2.50%	2.50%	

Year	Age	Baseline Income	Investment Income	Total Income	Phase 1	Phase 2	Phase 3	Phase 4	Legacy Phase	Total
1	65 / 65	\$15,000	\$129,000	\$144,000	\$132,000	\$555,104	\$684,795	\$531,436	\$545,428	\$2,448,763
2	66 / 66	\$15,000	\$133,320	\$148,320	\$0	\$577,308	\$719,035	\$563,322	\$578,154	\$2,437,819
3	67 / 67	\$85,000	\$67,770	\$152,770		\$523,971	\$754,987	\$597,121	\$612,843	\$2,488,922
4	68 / 68	\$86,050	\$71,303	\$157,353		\$465,767	\$792,736	\$632,948	\$649,614	\$2,541,066
5	69 / 69	\$87,116	\$74,957	\$162,073		\$402,454	\$832,373	\$670,925	\$688,591	\$2,594,344
6	70 / 70	\$88,198	\$78,737	\$166,935		\$333,778	\$873,992	\$711,181	\$729,906	\$2,648,857
7	71 / 71	\$89,296	\$82,648	\$171,944		\$259,475	\$917,691	\$753,852	\$773,700	\$2,704,719
8	72 / 72	\$90,410	\$86,692	\$177,102		\$179,270	\$963,576	\$799,083	\$820,122	\$2,762,052
9	73 / 73	\$91,542	\$90,873	\$182,415		\$92,879	\$1,011,755	\$847,028	\$869,330	\$2,820,992
10	74 / 74	\$92,690	\$95,197	\$187,887		\$0	\$1,062,343	\$897,850	\$921,490	\$2,881,682
11	75 / 75	\$93,854	\$99,670	\$193,524			\$989,231	\$951,720	\$976,779	\$2,917,731
12	76 / 76	\$95,038	\$104,292	\$199,330			\$909,670	\$1,008,824	\$1,035,386	\$2,953,880
13	77 / 77	\$96,238	\$109,072	\$205,310			\$823,340	\$1,069,353	\$1,097,509	\$2,990,203
14	78 / 78	\$97,456	\$114,013	\$211,469			\$729,911	\$1,133,514	\$1,163,359	\$3,026,785
15	79 / 79	\$98,694	\$119,119	\$217,813			\$629,040	\$1,201,525	\$1,233,161	\$3,063,726
16	80 / 80	\$99,948	\$124,399	\$224,347			\$520,367	\$1,273,617	\$1,307,151	\$3,101,134
17	81 / 81	\$101,222	\$129,856	\$231,078			\$403,520	\$1,350,034	\$1,385,580	\$3,139,134
18	82 / 82	\$102,516	\$135,494	\$238,010			\$278,114	\$1,431,036	\$1,468,714	\$3,177,864
19	83 / 83	\$103,828	\$141,322	\$245,150			\$143,745	\$1,516,898	\$1,556,837	\$3,217,480
20	84 / 84	\$105,162	\$147,343	\$252,505			\$0	\$1,607,912	\$1,650,248	\$3,258,159
21	85 / 85	\$106,514	\$153,566	\$260,080				\$1,494,544	\$1,749,262	\$3,243,806
22	86 / 86	\$107,886	\$159,996	\$267,882				\$1,371,911	\$1,854,218	\$3,226,129



Our Recommendations

%	Name	Investment Amount	Risk Comfort Zone	AssetMark Profile
10.50%	Smith Joint - Phase 1 - PUMA - FITR	\$258,416.00	Conservative	Profile 1
21.69%	John IRA - Phase 2 - IMA - Taxable	\$533,753.00	Conservative	Profile 1
26.51%	Jane IRA - Phase 3 - PUMA	\$652,186.00	Moderate Growth	Profile 4
20.38%	John IRA - Phase 4 - PUMA	\$501,354.00	Growth	Profile 5
20.91%	Smith Family Trust - Legacy - PUMA	\$514,556.00	Maximum Growth	Profile 6



The Personal Benchmark is derived from Clark Capital Income Navigator Personal Income Plan ("Income Plan") that an investor and their financial advisor established for their account(s). The income plan is calculated by separating potential investments into clearly defined phases over an investor's lifetime. For each phase, the rate of return used for the various phases is based on the duration period and the assets allocated.

The Personal Benchmark and all projected rates of return presented in the Income Plan are not based on any Clark Capital product or strategy. They are based on Clark Capital's financial and market research and historical market activity as well as external sources of research. As a result, the Personal Benchmark should not be interpreted as a level of performance that any Clark Capital product or strategy could achieve, is likely to achieve, or may achieve in the future. The rates or returns used in the Income Plan are projections and are not a recommendation to invest in any security or group of securities. The Personal Benchmark does not include the reinvestment of income and dividends or other distributions and do not reflect the deduction of taxes which will have the effect of lowering the returns."



Summary

Total Amount Required

\$2,460,265

Legacy Ending Balance

\$2,955,342

Inflation Assumption

3.00%

Total Years of Income

30

Income Generated

\$3,987,154

Total Baseline Income

\$2,863,706

Total Income

\$6,850,860





How Do We Help
You Keep Clients?

SAMPLE

Quarterly Review & Outlook



Quarterly Review & Outlook

Prepared exclusively for
Valued Client

On behalf of
ABC Advisor Company



Agenda

- Any specific topic you would like to cover
- Market commentary & outlook
- Account performance & asset allocation
- Follow-up items

Quarterly Review & Outlook



Economic Gauges

The following graphics reflect the degree of Clark Capital’s positive (forward) or negative (reverse) outlook on the corresponding economic factors.

Economic Gauges

- These five gauges drive our expectations for the stock market. 12:00 is neutral, anything to the right of 12:00 is positive for stocks, anything to the left of 12:00 is negative.

Quarterly Review & Outlook



Economy

The Economy has moved back one notch.



Monetary Policy

Monetary Policy has moved backward one notch.



Valuations

Valuations have moved forward one notch.



Investor Sentiment

Investor Sentiment has moved forward one notch.



Interest Rates

Interest Rates have moved backward one notch.



Portfolio Allocation



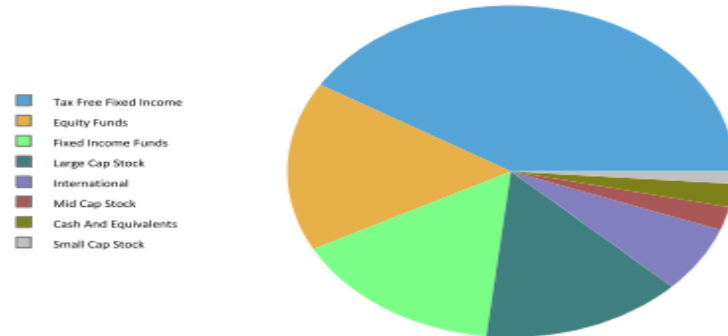
September 30, 2022

Household Summary

Quarterly Review & Outlook

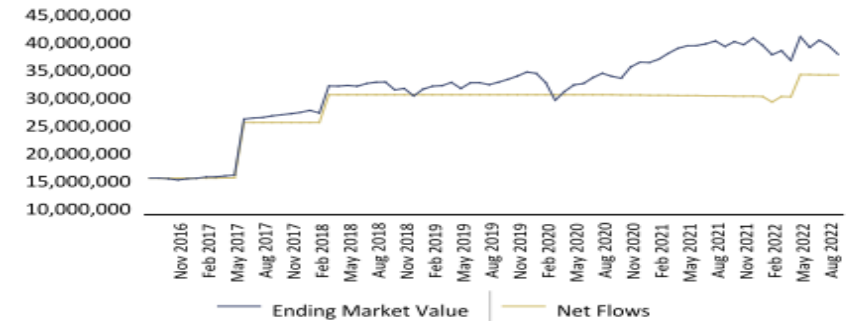
Household Asset Class Allocation

	% Assets	Market Value
Tax Free Fixed Income	41.25%	\$15,395,790.56
Equity Funds	16.50%	\$6,158,924.89
Fixed Income Funds	15.49%	\$5,779,263.46
Large Cap Stock	14.54%	\$5,428,073.69
International	6.48%	\$2,417,456.24
Mid Cap Stock	2.28%	\$851,846.13
Cash And Equivalents	2.26%	\$844,084.67
Small Cap Stock	1.19%	\$445,613.76
	100%	\$37,321,053.40



See Important Disclosures on the last page of this statement.

Household Cumulative Value (\$)



Performance



September 30, 2022

Household Summary

Household Performance Summary

	Inception Date	Market Value	1 Month	3 Month	Year to Date	1 Year	3 Year	5 Year	Inception Cumulative	Inception Annual	Prior Year
Funding Sleeve (FUN)	Sep 28, 2016	\$0.00	-	-	-	-	-	-	-	-	-
Navigator International ADR (ADR)	Sep 28, 2016	\$3,858,013.17	-8.80%	-8.33%	-30.40%	-27.00%	1.58%	0.53%	19.44%	3.00%	20.75%
Navigator All-Cap Core (ALL)	Sep 28, 2016	\$5,559,606.99	-7.90%	-3.46%	-25.56%	-18.76%	4.28%	1.80%	40.43%	5.81%	29.28%
Fixed Income Total Return -- TAMP (FTR)	Sep 28, 2016	\$5,727,706.33	0.14%	-1.63%	-12.51%	-12.00%	0.70%	1.04%	12.87%	2.04%	3.53%
High Dividend Equity 100-0 (HDE)	Sep 28, 2016	\$4,308,387.01	-7.24%	-4.97%	-16.99%	-10.49%	2.54%	3.65%	38.07%	5.52%	22.82%
Navigator Global Tactical (MAC)	Feb 23, 2021	\$1,908,580.05	0.07%	-0.96%	-18.91%	-13.27%	-	-	-7.82%	-4.96%	-
T FAMILY	Sep 28, 2016	\$21,362,293.55	-5.22%	-3.99%	-21.05%	-16.54%	2.64%	2.05%	24.54%	3.72%	18.57%
Fixed Muni Large (FML)	Sep 28, 2016	\$10,721,181.91	-2.86%	-2.71%	-10.44%	-10.12%	-1.88%	0.18%	1.85%	0.31%	0.53%
T FAMILY											
Fixed Short Duration Tax-Free Bonds (SDM)	Jun 21, 2017	\$5,237,577.94	-1.22%	-1.44%	-1.41%	-1.55%	0.62%	1.21%	6.53%	1.21%	0.21%
T FAMILY											
Total Household	Sep 28, 2016	\$37,321,053.40	-4.00%	-3.27%	-16.63%	-13.42%	1.23%	1.48%	14.71%	2.31%	11.98%

See Important Disclosures on the last page of this statement.

Quarterly Review & Outlook



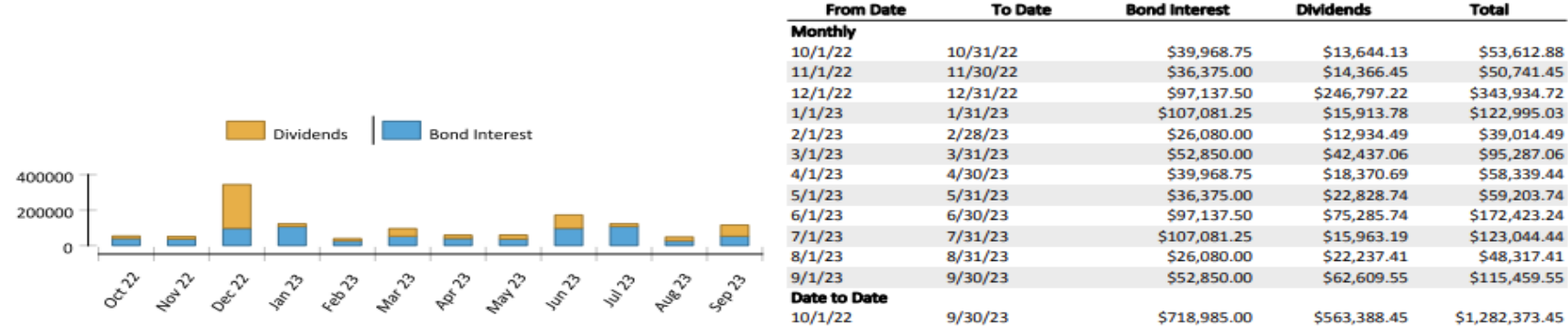
Projected Annual Income



September 30, 2022

Household Summary

Household Income Projection



See Important Disclosures on the last page of this statement.

Quarterly Review & Outlook



Market Updates, Calls and Book Reviews to Support Your Practice



Economic Gauges

- Healthcare**
- Economy**
- Monetary Policy**
- Valuations**
- Investor Sentiment**
- Interest Rates**

Clark Capital's Bottom-Up, Full Market Approach

The market moved higher with U.S. equities increased optimism of potential signing expected Q3 earnings. Growth outperformed Technology. The Healthcare and Comm bond-proxy sectors such as Utilities, S&P companies have reported with 75% beat estimates.

We believe ultra-low interest rates will persist into 2020 although higher P/E sectors. Momentum stocks, which have been in months of 2019, have continued to outperform both the Russell 2000 and Russell Large Cap.

The market shift away from momentum cap stocks has benefited our fund manager the International ADR portfolio has large and frontier market companies as lower favor less developed economies.

Below are strategy updates from October:

All Cap Core U.S. Equity

- Healthcare is now the largest than the benchmark.
- Although the strategy is underweight, it remains the second largest.
- During the month, we repositioned and added a dividend.

High Dividend Equity

- Month to date, the High Dividend Equity benchmark the Russell 1000 from Energy and Healthcare.
- The biggest sector detractor is Communications.
- We believe ultra-low interest rates into 2020 will remain at risk for a correction.

First performance is not indicative of future results. This is not a recommendation to buy or sell a security.



Commentary

Navigator® Market Update

Author



K. Sean Clark, CFA®
EVP, Chief Investment Officer

March 23, 2020

Into the Unknown

We are certainly living in scary and uncertain times. The outbreak of the coronavirus has turned the world upside down, the likes of which we have never dealt with before. The number of infected people and deaths continue to mount at a staggering rate. People are concerned for their families, friends, co-workers and their employment.

Much of the country is now under conditions that are approaching martial law. Non-essential businesses are being forced to close, large gatherings are forbidden, and many home goods are being rationed. These seemingly draconian measures are necessary to limit the spread of the virus, help keep the healthcare system from being overwhelmed, and to ultimately save lives.

Coming into this event, the U.S. economy was on solid footing. Jobless claims were low, the unemployment rate was at a 50-year low, housing starts were hitting cycle highs, and global PMI's were turning higher. That all changed quickly. The recession has started both in the U.S. and globally as a result of the response to stopping the spread of COVID-19. This is something that we have never seen—a combination of a global health and economic crisis.

The economy has ground to a halt as cities and states across the U.S. issue stay at home orders to try and stem the spread of the virus. In the coming weeks and months, we are going to see economic damage like we have never witnessed before. We are already now starting to see jobless claims rise, and they are likely to skyrocket starting this week.

Bracing for GDP Impact

There is so much unknown about the extent of the economic weakness we will face over the next hopefully only two quarters. As social distancing measures increase in a greater number of areas and as financial conditions tighten further, the negative effects on near-term GDP growth become that much greater.

The economy didn't really shut down until midway through March. First quarter GDP will be marginally positive at best, with we believe a 1% growth rate. However, GDP is going to be down significantly in the 2nd quarter, initial jobless claims and unemployment will skyrocket, and retail sales will plummet as consumers are confined at home.

As a result, we expect 2nd quarter GDP to decline somewhere between 10%-15%. The 3rd quarter will likely be a transition period during which people slowly start to return to work. That quarter may also have negative GDP or slightly positive economic growth and will largely depend on how quickly active cases peak in the U.S. and when social behavior returns to some normalcy.

We believe the 4th quarter should be the rebound quarter and is likely to exhibit stronger than trend growth as depleted inventories are replenished and pent up retail demand is unleashed. We expect the 4th quarter to grow by at least 5%, which should set the stage for a strong economic rebound year in 2021.

First performance is not indicative of future results. This is not a recommendation to buy or sell a particular security. Please see attached disclosures.

Navigate Your Future. Enjoy the Journey.

One Liberty Place + 1650 Market Street + 53rd Floor + Philadelphia, PA 19103 + 800.766.2264 + ccmg.com



As of December 31, 2019



Quarterly Review & Outlook

Prepared exclusively for
Valued Client

On behalf of
Valued Advisor

One-on-One Presentation

Page 1





A Collaborative Partnership

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 or 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 your clients' goals.

Strategic Tax Management

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, charitable giving, and liquidity management to manage risks associated with concentrated positions.

Philanthropic Planning

We help develop a personalized strategy that aligns with your clients' values and helps you 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

Whether it's passing on a business to family members, or selling it to a strategic buyer, private equity, or through an ESOP, developing a personalized strategy can help your clients navigate the business succession planning.

Equity Compensation Planning

We can support your efforts to help clients navigate the complexities of equity compensation and other methods of stock-based compensation.

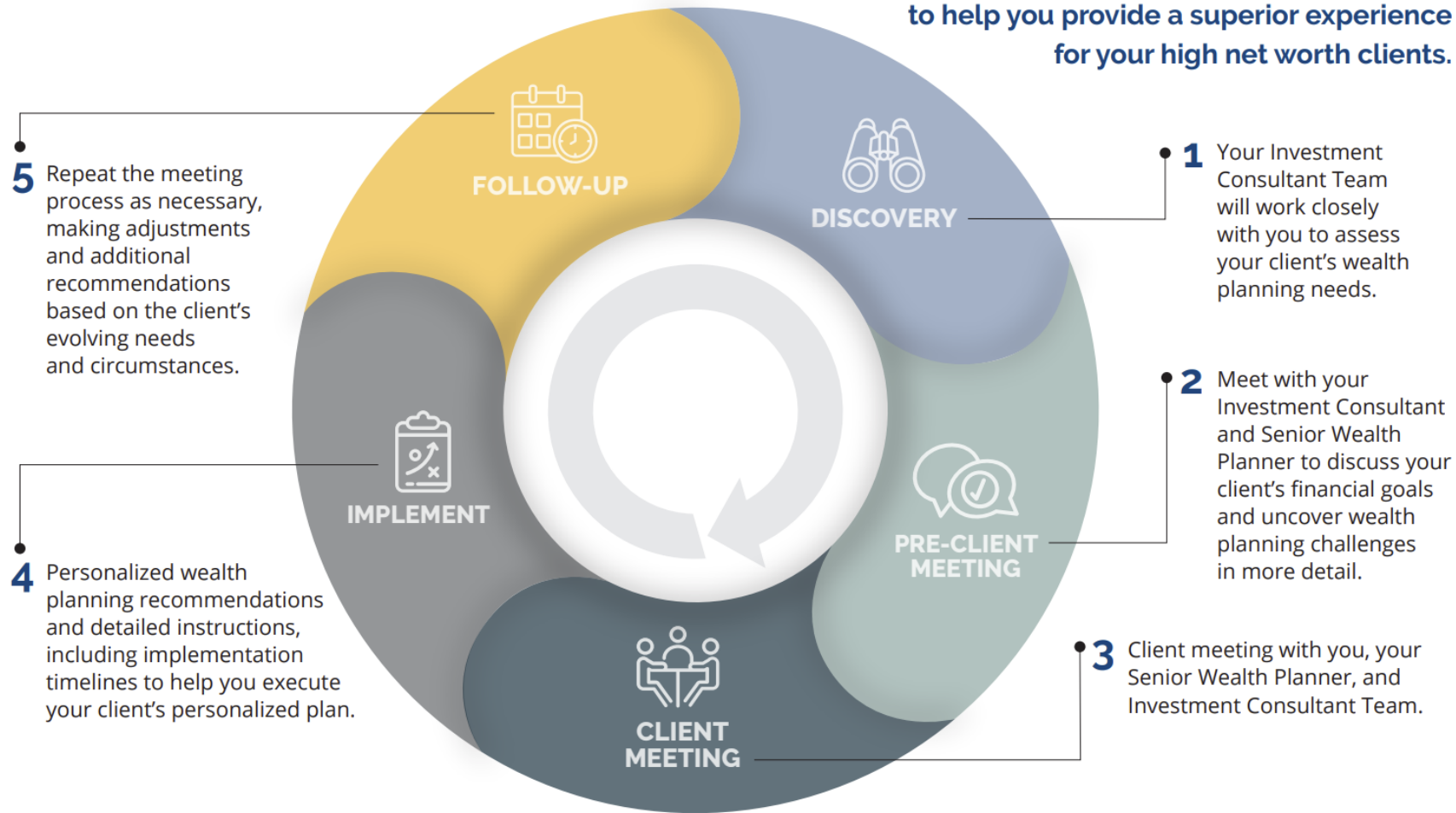
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Advanced Wealth Planning

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



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Consultant or call 800.766.2264.**



Q&A



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