

Partnering with Clark Capital in 5 Easy Steps

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

Case Design Consultation

1

- 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

Portfolio Analysis from CFA® Charterholders*

2

- 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

Point of Sale Support*

3

- 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

Concierge Level Education & Resources

4

- 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

Quarterly Client Reviews with Your Dedicated Client Portfolio Manager*

5

- 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+

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