Navigator® Elite Advisor Program

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

Benefits to You

Sophisticated Presentations with Compelling Analytics

Advanced Investment Planning Strategies

Concierge Level Portfolio Oversight

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

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.

Services Available to You and Your Clients	Client Household Account Value: $500,000 to $1,000,000	Over $1,000,000	Over $5,000,000
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 CPM Team			✓
Direct Access to Senior Leadership at Clark Capital			✓

A Long-Term Partnership to Help You Grow Your High Net Worth Business	Navigator® Elite Advisor Program (AUM with Clark Capital): Silver $10 million	Gold $25 million	Platinum $50 million
Annual Book Review with a CPM Team Member	✓	✓	✓
Quarterly Client Economic and Capital Market Review Group Call	✓	✓	✓
Monthly Market Recap of Investment Team Insights	✓	✓	✓
Quarterly Portfolio Reviews by Phone with the Head of Your CPM Team		✓	✓
2 Days Worth of Exclusive Time with the Head of Your CPM Team		✓	
4 Days Worth of Exclusive Time with the Head of Your CPM Team			✓