Partnering with Clark Capital
in 5 Easy Steps

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

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®-Level Experts*

- 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