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Clark Capital Management Group is an independent asset management firm providing institutional quality investment solutions to individual investors, corporations, foundations, and retirement plans. The firm was founded in 1986 and has been entrusted with approximately \$3.3 billion in assets. Our investment philosophy is driven by a single-minded focus: to add value for our collective clients. This focus requires us to seek superior risk-adjusted returns over full market cycles. It compels us to maintain a long-term perspective and provide innovative investment management solutions that enable clients to achieve their life goals.

Contact: Ryan Kenney at (215) 805-1075 or rkenney@ccmg.com

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Contact: Nigel Clarke at (610) 971-1545 or nigel.clarke@schwab.com



Chartwell Investment Partners

Founded in 1997, Chartwell Investment Partners, LLC, is a Berwyn, PA based investment management firm with \$9.7Billion in assets under management, focusing on institutional, sub-advisory and private client relationships. Chartwell is a wholly-owned subsidiary of TriState Capital Holdings, Inc., a bank holding company listed on the NASDAQ Global Select Market (Ticker: TSC) based in Pittsburgh, Pennsylvania.

Contact Michael Honer at (610) 296-1400 or honer@chartwelltscs.com



FamFunds

Fenimore Asset Management is an independent, research-based, bottom-up value investment advisor and the manager of FAM Funds: FAM Value Fund (FAMVX & FAMWX), FAM Equity-Income Fund (FAMEX), and FAM Small Cap Fund (FAMFX & FAMDX). The firm is known for high-quality equities, low turnover, and concentrated portfolios as it seeks to mitigate risk and grow capital over the long term. Since 1974, Fenimore has followed a time-tested, repeatable process navigating multiple economic and financial market cycles.

Contact Bill McCartan at (518) 823-1208 or mccartan@famfunds.com



Harbor Funds

Harbor Funds is a family of subadvised mutual funds that offers access to a lineup of respected institutional investment firms sourced worldwide. Harbor uses a “manager of managers” approach to investing by identifying experienced portfolio managers (subadvisers), who specialize in a particular asset class to make all of the day-to-day investment decisions for our funds. Investors in Harbor Funds have the benefit of both a professional portfolio manager combined with Harbor’s internal philosophy of closely managing costs, allowing us to offer a family of funds that we believe delivers long-term value to our shareholders.

Contact Bryan Sullivan at (773) 630-4001 or (617) 603-6318 or bryan.sullivan@harborfunds.com



[TD Ameritrade Institutional](#)

TD Ameritrade Institutional is a leading provider of comprehensive brokerage and custody services to more than 5,000 fee-based, independent Registered Investment Advisors and their clients. Our advanced technology platform and outstanding personal support allows advisors to run their businesses more efficiently and optimize time spent with clients.

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Contact: TJ Cotton at (201) 284-1670 or tj.cotton@tdameritrade.com

Bronze Level



[Ameriprise Financial Services, LLC](#)

Since we were founded by John Tappan in 1894, we at Ameriprise Financial have stayed true to our mission: To help people feel confident about their financial future. During trying economic times our strength, integrity, our breadth of services and personal relationships have made us America's leader in financial planning.

1. Contact: Mike L. Hartnett at (610)825-9055 or michael.l.hartnett@ampf.com
Abramson, Hartnett & Associates, a private wealth advisory practice of Ameriprise Financial Services, LLC. <https://www.ameripriseadvisors.com/michael.l.hartnett/>

or Edward Eckenroad at (302) 468-8229 or Edward.eckenroad@ampf.com