Brinker Capital

Biographies

Executive Management

Charles Widger, Executive Chairman

Mr. Widger is the founder of Brinker Capital and has over 30 years of experience working with investors in strategic investment planning and manager search and monitoring. He is a past chairman of the board of trustees for Gettysburg College and is chair-emeritus of the Money Management Institute, the $3.5 trillion dollar managed account industry's association. He is also the chairman of the Villanova University School of Law Board of Consultors. He was previously chief executive officer of the Mutual Benefit Capital Companies, first vice president with Van Kampen, Morris Stone and a vice president at CIGNA. Earlier in his career, he practiced law in Pennsylvania in private practice and as an assistant attorney general for the Pennsylvania Department of Justice. Mr. Widger is a frequent market and industry commentator, with his thoughts having appeared in top outlets such as *The Wall Street Journal, Barron's, the Associated Press, Dow Jones, Investment Advisor, Fund Action* and many others. Mr. Widger is a graduate of Gettysburg College and Villanova University School of Law, and holds an L.L.M. in Taxation from Boston University's School of Law. He also served as a Lieutenant in the U.S. Navy.

John E. Coyne, III, Vice Chairman

Mr. Coyne leads Brinker Capital's initiative to broaden distribution into new marketplaces, a key part of the firm's strategic plan. He is the firm's principal spokesperson with the news media and investment advisors. Previously, Mr. Coyne served as president of Brinker Capital and was responsible for policy and oversight for sales, marketing, and key account management. In addition, John served as Chief Compliance Officer and has held a variety of regional and national sales positions at the firm, including that of national sales director. Prior to joining Brinker Capital, John held investment advisory and national sales positions at Butcher & Singer, Van Kampen, Morris Stone, Fidelity Leasing, and Mutual Benefit Capital Companies. John has 34 years of industry experience. John is a board member and Executive Committee member of the Money Management Institute and the recipient of its 2011 Pioneer Award, chairman emeritus and current board member for the Philadelphia Chapter of Teach for America and a member of the Philadelphia chapter of the Financial Planning Association. John is a frequent speaker and host at industry conferences and has been quoted extensively in top financial and advisor media. In addition to appearances on Bloomberg, Fox Business News and Fox Business's "Cavuto on Business", John's thoughts have appeared in *The Wall Street Journal, Newsweek, InvestmentNews, Registered Rep, Fund Fire, Money Management Executive* and many others. John is a graduate of Mount St. Mary's University. He also attended Temple University Graduate School. John is a trustee of Mount St. Mary's University, chairman of its Endowment committee and chairman of the Board of Trustees.

Noreen D. Beaman, CPA, Chief Executive Officer

Ms. Beaman is the chief executive officer of Brinker Capital, Inc. Ms. Beaman is responsible for developing and executing the firm's detailed operating plan and for the oversight of the company's short and long term strategies. Previously, Ms. Beaman served as the firm's chief operating officer responsible for policy and oversight of operations, administration, performance, reconciliation, technology and human resources. Noreen has more than 20 years of investment experience working with financial advisors and institutional and high net worth investors in strategic planning and investment management. Additionally, she is a member of the firm's investment management and finance committees. As one of Brinker Capital's original partners, Noreen previously held a variety of regional and national sales positions at the firm, including new business development and client service in New York and New Jersey; and was also the firm's chief financial officer. Noreen is a frequent speaker at industry conferences and has been quoted extensively in top financial and advisor media. Prior to joining Brinker Capital, Noreen was treasurer at Mutual Benefit Capital Companies, a subsidiary of Mutual Benefit Life Insurance Company. She also worked at Ernst and Young. Ms. Beaman is a graduate of Saint Peter's College and is a member of their Board of Regents.

The Brinker Capital leadership team is committed to delivering innovative solutions, quality service and value to our clients.

Executive Management, *Continued*

Sheila Bonitz

Sheila Bonitz, Vice President of Investment Management

With over 20 years of industry experience, Sheila is responsible for the oversight of the Investment Department's Research Group and Investment Strategist Team. She also acts as the Investment Department's Liaison with Brinker Capital Investment Services and serves on Brinker Capital's Operating, Brokerage and Valuation Committees. Prior to her current role at Brinker Capital, Sheila served in various positions within the firm's Marketing, Online Services and Strategic Planning departments. Prior to joining Brinker Capital, Sheila worked for SEI as a Product Planner. She is a graduate of Millersville University with a B.S. in Computer Science and a minor in Business Administration. She obtained her M.B.A. from Saint Joseph's University and earned her Lean Six Sigma certificate from Villanova University. In addition, Sheila holds FINRA 6 and 63 licenses.

Avery Cook

Avery Cook, CIMA®, Vice President of Strategic Planning

With over 16 years of industry experience, Avery is primarily responsible for the evaluation, implementation and maintenance of product offerings at the firm. Prior to his current role at Brinker Capital, Avery served in various positions within the firm's performance and reconciliation, pricing, client services and operations departments. Avery is a graduate of Hamilton College, where he majored in Economics and Computer Science with a minor in Government. He is a member of the Investment Management Consultants Association and was awarded its Certified Investment Management Analyst (CIMA®) designation and also earned a Lean Six Sigma certificate from Villanova University. In addition, he holds FINRA series 7, 24, 53, 63 and 65 licenses. Outside the office, he enjoys coaching high school lacrosse and playing golf.

Leo J. Dolan, Jr.

Leo J. Dolan, Jr., Executive Vice President of Family Wealth Partners

A key senior manager, Lee is the driving force behind a new business unit, Brinker Family Wealth Partners. This emerging group provides a broad offering, delivering External/Complementary CIO capabilities and "best of breed" non-investment services to wealthy families and Family Offices. Formerly national sales director, Lee helped grow Brinker's AUM from $3 billion to nearly $16 billion during his tenure. He is also a member of the investment committee and a frequent speaker on investment topics. From 1995 to 2001, Mr. Dolan served as senior vice president and operating head of the Investment Advisory Group at SEI Investments. While there, he helped transform a small unit into a highly profitable $25 billion division with the industry's leading mutual fund program. Earlier, he helped start and create a unique business model for SEI's now $500 billion fund administration group. Prior to his 20 years of investment industry experience, Mr. Dolan had an extensive, diversified career including management positions at Scott Paper Company, Beech Nut Foods, the Colonial Penn Group, and United Hospitals. In addition, as owner of a marketing firm, he helped develop business and marketing strategies that led to initial public offerings and strong growth for companies such as U.S. Healthcare, Nutri/System and Baldwin, Inc. Mr. Dolan holds a B.S. from Saint Joseph's University and an M.B.A. from The Wharton School of the University of Pennsylvania. He is also a former naval officer.

Philip F. Green, Jr.

Philip F. Green, Jr., Chief Financial Officer

Phil is responsible for all financial operations of the firm. He also oversees the registered investment advisor services department, focusing on providing solutions and support to that marketplace and is a member of the key management team. Phil has been with Brinker Capital for 12 years in various capacities of operations, finance and accounting. He has 22 years of industry experience which includes prior work at a number of large financial and insurance institutions in the commercial underwriting disciplines including AIG, Liberty Mutual, and Citibank/Travelers. He received his B.S. in Finance and Economics from Pennsylvania State University and his M.B.A. from Villanova University. In addition, Phil holds his FINRA series 7 and 27 licenses. He sits on the technology board at the St. Eleanor School, in Collegeville, PA, and is a member of the MMI, the managed account industry's association. Phil enjoys reading, biking, skiing, hiking, basketball, and running.

Edward Kelly

Edward Kelly, National Sales Manager

Ed joined Brinker Capital in 2012 and currently serves as national sales manager. In his role, Ed oversees all sales functions that support the insurance-based, bank and independent broker dealer channels. Ed is a member of Brinker Capital's operating committee and brings over 20 years of expertise in the financial services industry to the team. Prior to joining Brinker Capital, Ed served as senior regional consultant for Genworth Wealth Management, as well as vice president of sales for Atlantic Trust. He also held positions at Nationwide and Curian Capital. He holds FINRA series 7, 63, and 66 licenses and is a graduate of Villanova University. He enjoys golfing, basketball and spending time with his wife, Jody, and two children, Sophia, and Ed.

Executive Management, *Continued*

Ali McCarthy

Ali McCarthy, National Director of Marketing

Ali joined Brinker Capital in 2012 as the national marketing director. She is a strategic marketing specialist leading the marketing and communication development efforts of the firm. In addition to strategic business development efforts, she directs media relations, branding, social media content, advertising, fulfillment and video and website content. She manages and oversees sponsorships, events, charitable contributions, marketing training and more. Ali is a member of Brinker Capital's operating committee. Ali has more than 15 years of marketing experience in the financial services industry. Prior to joining Brinker Capital, Ali served as an officer at The Guardian Life Insurance Company in New York City. She was director of the Channel Marketing team which provided strategic and organizational leadership to The Guardian Life Insurance Company and RS Investments. Her tenure includes vice president of Sub-Advisory Marketing at AllianceBernstein Investments, assistant vice president of Annuity Marketing at AXA Equitable LLC and assistant vice president of Marketing at DWS (previously Scudder Investments). Ali earned her M.B.A. from Texas A&M University and B.S. from Purdue University and holds FINRA series 6, 63, and 26 licenses.

Brendan McConnell

Brendan McConnell, Chief Operating Officer

Brendan was named Brinker Capital, Inc.'s chief operating officer in June 2014. In his role, he is responsible for account administration, operations, administration, performance and reconciliation, technology, IT and client services. He is the chair of Brinker Capital's operating committee and a member of the executive, technology, custodian and finance committees. He has several years of experience as an operations manager, where he was responsible for all operational aspects of the firm's relationship with Fidelity IWS and National Financial, LLC. Brendan has driven a strong track record of results, execution excellence and improved efficiency while also enhancing the company's client experience. Brendan is a graduate of Saint Joseph's University. He is also certified through Villanova University as a business analyst and in Lean Six Sigma along with holding FINRA series 7, 24, 63, and 65 licenses. He enjoys spending time with his family, reading, running, and playing golf.

William P. Simon, Jr.

William P. Simon, Jr., Executive Vice President of Sales and Distribution

As Executive Vice President, Bill is responsible for sales and distribution at Brinker Capital and also serves on the firm's management and operating committees. Bill began working in the financial services industry in 1981 spending his entire career in the area of distribution. Prior to joining the firm, he served as managing partner at PPB Advisors, LLC. where he helped to build an alternative securities start-up. Previously, Mr. Simon spent 22 years at American Funds, holding a variety of senior positions including national sales manager for the Eastern U.S. and division manager and member of the AFD Board. Bill also held positions at Van Kampen Merritt and with Federated Investors, where he began his career. Bill graduated from the University of Pittsburgh with a B.A. in Economics and holds Series 7, 65, 63 and 26 licenses. Bill serves on the board of trustees for the Cornerstone Christian Academy of Philadelphia and is a member of the board for Young Life, Liberty Region.