

Investment Team Biographies



William H. Miller

William H. Miller, Chief Investment Officer

As chief investment officer of Brinker Capital, Bill chairs the company's investment committee and sets the investment philosophy and process for Brinker Capital. He is also responsible for asset allocation, manager selection and review and alternative investments. Bill's investment experience of almost 30 years includes the management and launch of Nationwide Insurance's Investor Destination Series of passive asset allocation funds, and Optimal Funds, which is an active management product. Bill initially joined the Conshohocken-based investment operations, of Nationwide, as interim chief investment officer. Bill also held senior investment positions at Putnam Investments and Delaware Capital Management. He holds a B.A. in Economics from Trinity College.



Christopher P. Hart

Christopher P. Hart, Core Investment Manager

With over 18 years of industry experience, Chris is responsible for the overall investment management of Brinker Capital's platform, Core Asset Manager. This involves new manager selection, on-going manager due diligence, manager termination decisions, and asset allocation using the Core universe of SMA, mutual funds, ETFs, and proprietary discretionary managed accounts. Prior to joining Brinker Capital, Chris served as the Investment Officer for U.S. Growth Strategies within the Investment Advisor Research Department at Morgan Stanley. He also held roles at RS Investments, Haverford Financial Services, Credit Suisse, Prudential Securities and Oracle Corporation. Chris obtained his M.B.A from Darden Business School, University of Virginia and B.A. in Economics from Trinity College. In addition, Chris holds his FINRA series 7 and 66 licenses. In his spare time, Chris enjoys spending time with family, playing squash, and coaching little league baseball.



Amy Magnotta

Amy Magnotta, CFA, Senior Investment Manager

Amy has portfolio management responsibilities for Brinker Capital's mutual fund program, Destinations, and is involved in both asset allocation and investment manager selection decisions. She has over 15 years of industry experience and was previously employed as a consultant for Franklin Park Associates, LLC, where she selected private equity investments for institutional clients. Prior to that she served in a fixed income product management and institutional client service role at BlackRock, Inc. Amy graduated from Lehigh University with a B.S. in Finance and is a CFA charter holder. She is a member of CFA Institute and the CFA Society of Philadelphia.



Stuart P. Quint, III

Stuart P. Quint, III, CFA, Senior Investment Manager and International Strategist

Stuart has over 20 years of experience analyzing and managing investment portfolios in developed and emerging markets. His responsibilities at Brinker Capital entail asset allocation and investment selection across the firm's Crystal Strategies suite and Asset Class Strategies. Additionally, he advises the firm in formulating its international investment strategy and communicating with clients. Prior to Brinker Capital, Stuart spent six years at Aberdeen Asset Management (formerly Gartmore Global Investments) as an investment manager, where he was responsible for a global financial fund invested in emerging and developed markets. He also worked in various portfolio management roles involving emerging markets at LF Capital/ Friends Ivory Sime and Montgomery Asset Management. His career started as an equity analyst at Sanford C. Bernstein and Company, following the savings and loan industry. Stuart graduated cum laude with a B.S. /B.A. dual degree from the University of Pennsylvania. He also studied abroad in Russia and Mexico and became fluent in Russian and Spanish. In addition, Stuart holds the CFA designation and is a member of the CFA Institute.



Jeff Raupp

Jeff Raupp, CFA, Senior Investment Manager

With 19 years of investment experience, Jeff is primarily responsible for the portfolio management for Brinker Capital's mutual fund and retirement plan services programs. Jeff is also a member of Brinker Capital's operating committee, which develops and implements strategies to improve operational efficiencies throughout the company. Prior to his current role, Jeff served as the operations manager for Brinker Capital and was in charge of all operational aspects of the firm's relationship with Fidelity and National Financial Services, LLC. Before joining Brinker Capital, Jeff was employed as an electronic engineer and project manager for a small electronics firm. He also served as an officer in the United States Army. Jeff has a B.S. in Mechanical Engineering from the University of Delaware and a M.B.A in Finance from Villanova University. In addition, he is certified in Lean Six Sigma through Villanova University and holds FINRA series 7 and 66 licenses. He is a member of the CFA Institute and the CFA Society of Philadelphia, Inc.



Andrew Rosenberger

Andrew Rosenberger, CFA, Senior Investment Manager

As a member of Brinker Capital's due diligence team, Andrew serves as the senior portfolio manager on the Personal Portfolios product as well as the co-portfolio manager of the Brinker Capital Crystal Strategy products. Additionally, he is responsible for the investment oversight of Brinker Capital's Personalized Distribution and Dollar Value Averaging Strategies. Andrew's prior experience at Brinker Capital includes the position of quantitative investment manager, where he was responsible for the quantitative analysis of economic and capital market trends, portfolio risk analysis, asset allocation and investment strategy selection. Prior to that, he served as a member of the Institutional Investments and Private Client Group, where his responsibilities included asset allocation, client performance and attribution analysis, client account management and investment policy statement analysis. He earned his B.S. degree in Economics from the Pennsylvania State University. He holds his Series 7 and 65 licenses. Andrew is a CFA charter holder and a member of the CFA Society of Philadelphia.



Thomas K.R. Wilson

Thomas K.R. Wilson, CFA, Managing Director, Wealth Advisory, Senior Investment Manager

As the Managing Director for Wealth Advisory, Tom applies 23 years of industry experience directing the implementation of the firm's investment philosophy and discipline in institutional and high net worth portfolios. Tom began his career at Brinker Capital as the vice president of the Investment Management Group supervising the due diligence, performance measurement, investment strategy, relationship management and new accounts departments. Previously, Tom held the position of vice president at Davidson Capital Management where he served as a portfolio manager for institutional and high net worth accounts as well as an equity analyst covering the telecommunications and technology sectors. Tom is a frequent investment and asset allocation commentator with his views featured in various business news media, including The Wall Street Journal, Associated Press, Bloomberg U.S., Bloomberg Asia, FOX News, BusinessWeek and Foundation & Endowment Money Management. In addition, he is a member of the Financial Analysts of Philadelphia and the CFA Institute. Tom is an honors scholar and summa cum laude graduate of James Madison University with a B.A. in Economics. He also holds Series 7, 63 and 65 licenses.



Nicholas Boylan

Nicholas Boylan, Investment Strategy Analyst

As an investment strategy analyst, Nick acts as a point person for the sales team and advisors on investment-related interactions. He provides ongoing advisor and sales team support for product selection and portfolio analytics, builds and rebalances custom portfolios, generates proposals with recommendations for new portfolios and for existing portfolios requiring rebalancing, and collaborates with portfolio managers and due diligence managers on portfolio positioning and performance commentary. Prior to assuming his current role, Nick was an Operations Associate as well as a Performance Analyst. Before joining Brinker Capital, he worked for The Vanguard Group. Nick graduated from Penn State University with a B.S. in Finance and is Series 6, 7, 63, and 65 licensed.



Ryan Dressel

Ryan Dressel, Investment Analyst

With nearly five years of industry experience, Ryan is responsible for supporting Brinker Capital's portfolio managers by performing due diligence on new and existing mutual fund managers and individual securities, providing macro research, and generating new investment ideas. Prior to Brinker Capital, Ryan worked as a Financial Analyst at Helmes & Company and also as an Operations Associate at Upromise Investments. He is a graduate of Bentley University with a B.S. in Finance.



Andrew Goins

Andrew Goins, Assistant Investment Manager

With nearly eight years of industry experience, Andrew assists in the management of Brinker Capital's Core Asset Manager platform. This involves new manager selection, ongoing manager due diligence, manager termination decisions, and asset allocation using the Core universe of SMA, mutual funds, ETFs, and proprietary discretionary managed accounts. Before assuming his current role, Andrew was an Investment Analyst and Senior Investment Analyst. Prior to Brinker Capital, Andrew was an Investment Analyst at Budros, Ruhlin & Roe. He graduated from The Ohio State University with a B.S. in Business Administration, holds a Series 7 license and is a Level III candidate in the CFA program.



Colton Growney

Colton Growney, Portfolio Specialist

Colton is responsible for the trading of mutual funds for the Destinations platform for new accounts, deposits, liquidations, systematic withdrawals, rebalancing, and account and model maintenance. He manages Brinker Capital mutual fund trades and positions by coordinating with the custodian, broker and recordkeeper. In addition, he assists the investment team with research. Colton is a graduate of Williams College and recently passed the CFA Level I exam.



Sharon Johnson

Sharon Johnson, Executive Assistant

With over 30 years of professional experience, Sharon is the executive assistant to the Chief Investment Officer and Executive Vice President of Wealth Advisory. In this role she coordinates investment meetings and committees, arranges travel and assists with various projects. Prior to Brinker Capital, Sharon held similar positions at Lincoln Financial, Steel Rudnick & Rubin, and Thomas Jefferson Hospital.



Greg Keck

Gregory Keck, Client Portfolio Manager

As a member of the Wealth Advisory Team, Greg is responsible for consulting and communicating with Brinker Capital's institutional and high net worth clients. Greg works in conjunction with Brinker Capital's due diligence group to communicate Brinker Capital's investment philosophy and implement current investment strategies. Additionally, Greg monitors portfolios for adherence to investment strategy guidelines and provides institutional clients with periodic performance reviews. Greg has over 17 years of industry experience, most recently as a senior investment analyst in Brinker Capital's due diligence group, where his responsibilities included initial and ongoing due diligence for the separately managed account program. Prior to Brinker Capital, Greg held positions with Van Kampen Funds and The Vanguard Group. Greg graduated from Moravian College with a B.A. in Business Management and is FINRA series 7, 63, and 65 licensed.



Dave Kreyskop

Dave Kreyskop, Portfolio Specialist

Dave has over a decade of industry experience and is responsible for the trading of several Brinker Capital products. He invests/divests client account assets as appropriate, rebalances accounts, and monitors drift across a specified group of discretionary products. Dave works closely with the investments team to ensure timely and effective execution of Portfolio Manager's instructions. Before assuming his current role, he held various positions within the Operations group at Brinker Capital. Dave is a graduate of Penn State University with a B.S. in Finance and is Series 7 licensed.



Michael Kutsaya

Michael Kutsaya, Head of Portfolio Implementation

With 20 years of industry experience, Mike serves as the Head of Portfolio Implementation. In this role he supervises a team of traders and ensures that all regulatory and internal compliance procedures are followed within the group. Mike originally joined Brinker Capital in 2002 as Director of Operations where he was responsible for working with the investment team, chief financial officer and chief compliance officer in the development and oversight of back office policies and procedures. Prior to joining Brinker Capital, Mike was a Vice President of Global Operations at Wachovia and a Fixed Income Settlement Manager at Lazard Asset Management. He earned a B.S. in Accounting and Finance from Drexel University. In addition, Mike holds his FINRA series 7, 24, and 53 licenses.



Jaime Lipson

Jaime Lipson, Operations and Administrative Business Analyst, Wealth Advisory

With 15 years of industry experience, Jaime is the operations and administrative business analyst for the Wealth Advisory team. She is responsible for monitoring service level agreements between client portfolio managers and their clients and serves as the liaison between Wealth Advisory and the Client Services and Operations teams to ensure we deliver an outstanding client service experience executed with operational excellence. Jaime began her career at Brinker Capital as an executive assistant and was later promoted to manager of administration for the Institutional Investments and Private Client Group before assuming her current role. Prior to Brinker Capital, Jaime worked at Lockwood Financial and Managers Investment Group. She received her B.A. in Business Administration from the University of Pittsburgh.



Leigh Lowman

Leigh Lowman, Senior Investment Analyst

With over 10 years of industry experience, Leigh is a senior investment analyst for Brinker Capital's Destinations program. She is involved in the investment process including asset allocation, manager selection and due diligence, and also serves as the liaison between the Destinations team and other areas of the firm to support the Destinations program on third-party platforms. Leigh began her investment career at Brinker Capital as an investment associate. Prior to rejoining Brinker Capital, Leigh was an outreach analyst for The Investment Fund for Foundations (TIFF) and a senior associate at Mondrian Investment Partners. She received her B.A. in Economics from Wittenberg University and holds FINRA series 7 and 63 licenses.



Denis McCartan

Denis McCartan, Senior Portfolio Strategist

With over 17 years of relevant industry experience, Denis plays an integral role in educating advisors on how to utilize Brinker Capital's investment solutions. Denis' managerial responsibilities include the Investment Strategy Department, which works with advisors to craft custom allocations and provide on-going portfolio management for some of Brinker Capital's largest clients. Former positions held by Denis at the firm include Internal Investment Consultant for the Midwest and South East regions. Prior to joining Brinker, Denis held positions in various industries including personal production and investment banking, and is currently enrolled in the Chartered Financial Analyst program. Denis holds the Series 7 and 66 licenses and is a graduate of Queen's University Belfast, Ireland where he attended the School of Geosciences. Denis enjoys skiing and sailing with his three sons.



W. Byron McClennen

W. Byron McClennen, CIMA®, Client Portfolio Manager

Byron is responsible for consulting and communicating with Brinker Capital's institutional and high net worth clients. He has over 19 years of experience in the financial services industry. While at Brinker Capital, he has served as director in Institutional Investments and Private Client Group, regional director, internal investment consultant, investment strategy analyst and corporate trainer working with Brinker Capital's key broker/dealer and investment advisor relationships. Prior to joining Brinker Capital, Byron was employed by The Vanguard Group in their brokerage division. He holds FINRA series 7 and 66 licenses. He is a member of the Investment Management Consultants Association and was awarded its Certified Investment Management Analyst (CIMA®) designation in 2008. He is a graduate of the University of Delaware and enjoys movies, sports, and spending time with his family.



Doug O'Brien

Douglas M. O'Brien, Portfolio Specialist

Doug has a decade of industry experience and is responsible for the trading of several Brinker Capital products. He invests/divests client account assets as appropriate, rebalances accounts, and monitors drift across a specified group of discretionary products. Doug works closely with the investments team to ensure timely and effective execution of Portfolio Manager's instructions. Before joining the Investment department, Doug served in several roles within the Performance department, most recently Supervisor and Senior Performance Analyst. He also attended Mary Washington University.



Joe Preisser

Joseph Preisser, Portfolio Specialist

With 15 years of industry experience, Joe is responsible for the trading of the Crystal Strategies suite, as well as the for the Asset Class Strategies and Core Asset Manager portfolios. He is also responsible for assisting in the management of the Real Assets, International ETF, and Emerging Markets ETF Asset Class Strategies as well as for the Crystal Strategies suite. Prior to joining Brinker Capital, Joe worked at Spear, Leeds, and Kellogg (a firm later acquired by Goldman Sachs) and then for Goldman Sachs as a trader on the floor of the New York Stock Exchange. Joe received a Bachelor of Arts from Hamilton College.



Kira Reitz

Kira Reitz, Investment Strategy Analyst

As an investment strategy analyst, Kira acts as a point person for the sales team and advisors on investment-related interactions. She provides ongoing advisor and sales team support for product selection and portfolio analytics, builds and rebalances custom portfolios, generates proposals with recommendations for new portfolios and for existing portfolios requiring rebalancing, and collaborates with portfolio managers and due diligence managers on portfolio positioning and performance commentary. In addition, Kira works with the investment team to identify business needs, lead cross-functional projects, and manage and evaluate processes on a daily basis to improve the client experience. Prior to joining Brinker Capital, Kira worked at UBS Private Wealth Management as a Wealth Strategy Associate. She graduated Cum Laude from Bucknell University with a B.S.B.A. degree in Business Management. Kira is Series 7 and 66 licensed and is a certified Lean Six Sigma Sensei.



Matt Schaefer

Matt Schaefer, Portfolio Specialist

As a portfolio specialist with 10 years of experience, Matt is responsible for trading and verifying accounts with their designated models and invests and rebalances accounts to match client requests. Prior to his current role, Matt was a Reconciliation Specialist for Brinker Capital. Before joining Brinker Capital, he worked at Bank of New York Mellon and PNC Bank. Matt is a graduate of Indiana University of PA with a B.S. in International Business and Marketing.



Brad Solomon

Brad Solomon, Junior Investment Analyst

Brad is a member of the investment team as a Junior Investment Analyst primarily responsible for assisting the Crystal Strategies portfolio managers with research and analysis. In addition, he conducts support research for other Brinker Capital products, assists with period performance reporting, and conducts meetings with potential new managers. Brad was a summer intern for Brinker Capital prior to joining the firm full-time in 2015. He is a graduate of the University of Virginia with a B.A. in Economics, is Series 65 licensed and is a Level 1 candidate for the CFA Program.



Dan Williams

Daniel Williams, CFP, CFA, Investment Analyst

With over a decade of industry experience, Dan has been a part of the Research Team supporting the Portfolio Managers' due diligence process across the various investments solutions for the past five years. Prior to Brinker Capital, Dan worked for the Vanguard Group as well as D. Crowley & Company. He graduated from Lafayette College Summa Cum Laude in 2003 with a B.A. degree Business and Economics. Dan holds FINRA series 7 and 63 licenses and is a CFA charter holder and was awarded the CFP designation.