

Biographies

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

Executive Management



Charles Widger, Founder & Executive Chairman

Mr. Widger is the founder of Brinker Capital and has over 39 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 \$4.2 trillion dollar managed account industry's association. He is also the past chairman of the Villanova University Charles Widger School of Law Board of Consultors. Mr. Widger 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 co-author of the New York Times best-selling book *Personal Benchmark: Integrating Behavioral Finance and Investment Management*. Mr. Widger is a graduate of Gettysburg College and Villanova

University Charles Widger School of Law and holds an L.L.M. in Taxation from Boston University's School of Law. He 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. John has 36 years of industry experience. He is a board member and Executive Committee member of the Money Management Institute and the recipient of its 2011 Pioneer Award. John is chair of the Gateway to Leadership Foundation which seeks to provide internships to minorities in the financial services field, audit chair of the Pacer ETF Funds Trust, and board member of CommonLit, an educational technology provider to middle school teachers. He is also 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*, *Fund Fire* and many others.



Noreen D. Beaman, CPA, Chief Executive Officer

Ms. Beaman is the chief executive officer of Brinker Capital, Inc. and 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, Noreen 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 25 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. 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. Noreen is a graduate of Saint Peter's University and is a member of their Board of Trustees.

Executive Management, *Continued*



Avery Cook

Avery Cook, CIMA®, Senior Vice President, Managed Products and Solutions

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.



Brian Ferko

Brian Ferko, Chief Compliance Officer

Brian has over 22 years of experience in compliance and operations in the Financial Services Industry. He previously served as Chief Operating Officer at Cipperman Compliance Services where he was responsible for day-to-day operations and management of the Compliance services offered by the firm. Prior to that he was Head of Compliance U.S. and Chief Compliance Officer for Aberdeen Asset Management Inc. and Chief Compliance Officer for Aberdeen Fund Distributors LLC where he was responsible for the supervision, management, planning and coordination of the firm's compliance and supervisory responsibilities. Prior to that, Brian served as Chief Compliance Officer for BHR Fund Advisers and the BHR Institutional Funds. At BHR, a start-up investment management firm, he developed the compliance program, policies and procedures manual, conducted risk assessments and directed all areas of testing and monitoring to comply with Investment Company Act and Investment Advisor Act regulations. Prior to his time at BHR, Brian worked for Ardmore Investment Partners as the Chief Compliance Officer and Head of Mutual Fund Administration and Turner Investment Partners as Director of Mutual Fund Compliance and Administration. Brian started his professional career at SEI Investments in Account Management and the Retail Transfer Agency. Brian is a graduate of LaSalle University.



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, Executive Vice President of National Sales

Ed joined Brinker Capital in 2012 and currently serves as executive vice president of national sales. 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.



Roddy P. Marino

Roddy P. Marino, CIMA, Executive Vice President National Accounts and Distribution

Roddy has over 20 years of sales experience and an extensive background of building successful distribution channels. As Executive Vice President, Roddy is responsible for distribution and positioning of Brinker Capital's products and services with the firm's strategic business partners. Prior to joining Brinker Capital, Roddy was the Managing Director and Head of Advisory Sales at Allianz Global Investors. He was responsible for all aspects of distribution with in the wirehouse, independent broker dealer and RIA channels. He also held sales leadership positions at Chartwell Investment Partners and Turner Investment Partners. Roddy earned a Bachelor's degree in Economics from the University of Virginia. He holds the CIMA designation from the Investment Management Consultants Association, and is FINRA Series 7, 24, 63 and 65 licensed.

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.



John Solomon

John Solomon, Executive Vice President, Wealth Advisory

With over 21 years of experience in the financial services industry, John is responsible for helping advisors build a profitable business, with a focus on acquiring affluent clients and meeting their most important goals. By providing access our 'best thinking' and innovative strategies, he empowers you to stay on the cutting edge of the investment landscape. Helping you leverage our disciplined and time tested endowment approach to investing enables you to help clients build and protect wealth. Prior to joining Brinker Capital, John was senior vice president of sales and client service at InvestorForce, Inc. He also spent 11 years at SEI Investments, the majority of the time spent working with investment advisors. John is a graduate of the University of Pittsburgh, with a B.S. in Applied Mathematics, and has also completed courses at The Wharton School of Business as part of its Executive Education program. He holds FINRA series 7 and 66 licenses. John enjoys spending time with his wife, Michelle, son, Brad and daughter, Delaney, and umpiring high school and NCAA baseball.