

## Wealth Advisory



**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 multi-asset class 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.



**Denis McCartan**  
*Relationship Manager*

With over 17 years of relevant industry experience, Denis plays an integral role in educating advisors on how to utilize Brinker Capital's multi-asset class 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 Capital, Denis held

positions in various industries including personal production and investment banking, and is currently enrolled in the Chartered Financial Analyst program. Denis holds FINRA 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,**  
**CIMA®**  
*Client Portfolio Manager*

Byron is responsible for consulting and communicating with Brinker Capital's institutional and high net worth clients. He has over 20 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.

# Wealth Advisory (continued)



**John Solomon**  
*Executive Vice President,  
Wealth Advisory*

John has over 21 years of experience in the financial services industry and is responsible for leading the Wealth Advisory team at Brinker Capital. In this role, John works collaboratively with his team to set and imple-

ment strategic direction while focusing on communicating value and growing assets under management. John is a member Brinker Capital's management team and operating committee. Prior to joining Brinker Capital, John was Senior Vice President of sales and client service at a firm focused on providing investment manager data to pensions & consultants. He also spent 11 years at an advisory focused investment firm, the majority of that time working with RIA's. 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, daughter, Delaney and working as an NCAA baseball Umpire.



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

As the chief investment officer for Wealth Advisory, Tom applies 23 years of industry experience directing the implementation of the firm's multi-asset class 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 CNBC, 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 FINRA series 7, 63 and 65 licenses.