Providing a new perspective

Brinker Capital


SILV

Investing is a matter of trust. We're prepared to earn yours.

At Brinker Capital, we know clients aren't just investing money. They're investing their future and their legacy. Likewise, when you entrust us with your clients, you're also entrusting us with your business and your reputation. That's a big responsibility, and one we intend to live up to, every day.

Our first, last, and only job is to help our clients, so they can better help their clients. As an **independent investment management firm,** we're in the business of providing advisors like you access to all of the **resources, services, and choices** you need. For more than 20 years, we've been pioneering smarter investment strategies, innovative products, and new technology, all to provide excellent support to advisors.

That way, you can provide your clients with all the support they need: **a savvy partner, sound advice, and solid investment results.**

The way we construct portfolios, the asset managers we select, the products we offer—they're all based on four core principles. These approaches comprise our perspective on how to invest successfully in a way that builds both wealth and relationships.

Diversification

Our portfolios span six asset classes, including both traditional strategies—domestic equity, international equity, and fixed income—and alternatives, including absolute return, real assets, and private equity. We ensure our clients have access to products and strategies usually only available to large, institutional investors.

Innovation

We continually look for ways to innovate, drawing on our extensive experience to find better investment strategies for the long term. This combination of curiosity and flexibility means that you have a ready source for new ideas and smart solutions.

Independent Analysis

At Brinker Capital, we form our own independent perspective on everything we recommend. When we're putting together a portfolio, we start by analyzing strategy options based on expected returns, historic returns, and market volatility. Armed with our in-depth research, we can make informed, strategic decisions about how to allocate assets.

Hands-On Management

We carefully evaluate every asset manager and strategy we recommend to make sure they meet our standards for performance and integrity. We also continue to monitor and reallocate portfolios to take advantage of market opportunities.

Understanding decisions is one thing. Trusting them is another.

The right investment management firm enables you to do both.

We follow a **disciplined investment process** at Brinker Capital. We make sure that we're looking at investments from the perspective of the investors you serve. We go beyond **due diligence** by researching and monitoring strategies and asset managers to ensure they're performing to our **rigorous standards.**

But we also do something more: We make sure that we always share our **perspective** with you.

Transparency

It's more important than ever to know how your clients' investments are being managed. So we tell you.

Given the history of some investment management firms, you may have concerns about the integrity and accountability of any financial professional with which you partner.

Brinker Capital ensures that all **account information is available online,** all the time. With daily updates, you can see a record of every account transaction, examine how every asset allocation breaks down, and access market commentary from your investment management team. You also receive monthly account statements and quarterly performance reports so you can gauge performance for yourself.

Another way we serve your clients' interests is by working on a fee basis, rather than a transaction basis. That way, you know that **every trade we make is purposeful and thoughtful.**

Most important, we assume **fiduciary responsibility** for every portfolio we construct, every asset we allocate, and every manager we select. You can be assured that there's nothing we do with your clients' money that we wouldn't do with our own.

Teamwork

No advisor wants to feel alone. Our experienced teams make sure you don't.

Collaboration is a large part of how we work at Brinker Capital—and has been since we were founded in 1987.

Any time your client needs something, or you have a question or concern, you have access to a **dedicated team of professionals,** including a regional representative.

We consider ourselves **educators** as well as investors at Brinker Capital. We regularly hold forums and workshops, so you can stay current with the latest financial news. You can also get a **well-rounded perspective** on the investment landscape through our timely newsletters and conference calls.

Technology

It's difficult to grow without the right resources. That's why we give you all the tools you'll need.

You know your clients best. It's our job to make sure you can help them reach their goals, efficiently and intelligently.

We offer a range of **tools** to help make accessing information simple and fast. You can customize your own dashboard on our website to get exactly the updates you want. And when you're on the road, we offer **mobile access** to account data and other useful resources.

With Brinker Capital, you can **streamline your administrative workload,** too. Prepopulated paperwork, customized online reports, and a client reporting package—which includes tax reports, household quarterly reports, monthly statements, and on-demand account reports—allow you to spend less time filling out forms and reports, and more time working with clients.

Our services are also designed to help you **build your business.** Training tutorials allow you to build the roster of services you provide. Our state-of-the-art Proposal Generation System (ProGen) helps you create proposals to win new clients or expand your existing services.

Seeing up close and far away. The next step and the horizon ahead.

That's the Brinker Capital perspective.

Brinker Capital

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Investing in any investment vehicle carries risk, including the possible loss of principal, and there can be no assurance that any investment strategy will provide positive performance over a period of time. The asset classes and/or investment strategies described in this publication may not be suitable for all investors.

Investment decisions should be made based on the investor's specific financial needs and objectives, goals, time horizon, tax liability, and risk tolerance. When investing in managed accounts and wrap accounts, there may be additional fees and expenses added onto the fees of the underlying investment products.

For more information about Brinker Capital and our investment philosophy, including information on fees, you may request a copy of our Form ADV Part II from a Brinker Capital Client Services representative at 800.333.4573 or at clientservice@brinkercapital.com. Brinker Capital does not render tax, accounting, or legal advice.

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