Brinker Capital

Institutional Investments and Private Client Group

Through our Institutional Investments and Private Client Group, Brinker Capital focuses on serving clients with $10 million and above in assets, including endowments, foundations, pension plans, corporations, and ultra-high-net-worth individuals and families.

Investments are so much more than funds and shares, dollars and cents. **They are how a future is protected and a legacy passed on.**

We start our process by gaining an understanding of investors' patterns, acceptable funding levels, and any asset class considerations. Then we discuss time horizons, risk tolerance, and tax concerns, so that as we develop and implement an investment strategy, it is truly personal.

Our hands-on management style includes **rigorously evaluating** every asset manager we recommend. We consider the integrity of their investment process, the quality of their professionals, the consistency of their performance history, and their capacity for investing successfully in the future. Only the firms that meet our standards become part of the Brinker Capital lineup. To ensure those managers continue to meet expectations, we conduct regular assessments. We do the same with portfolios, proactively reallocating them when necessary to keep your goals on track.

In fact, we believe so strongly in the soundness and **objectivity** of our recommendations that we assume fiduciary responsibility for initial and ongoing asset allocation and investment manager selection. Our goal is to handle every investor's assets as carefully as our own.

A **dedicated team** of investment professionals helps with:

- Investment policy creation
- Investment policy compliance
- Performance reporting
- Reviews and presentations
- Operational administration
- Tax management
- Socially responsible investing

Our multi-style, multi-manager portfolios include a number of strategies designed to enhance returns and **manage risk:**

- Active and passive investment strategies
- Core/satellite strategies
- Principal-protected securities
- Separately managed accounts
- Alternative investments
- Exchange traded funds (ETFs)
- Fixed income crossover strategies
- Mutual funds
- Private partnerships

We want to be sure investors have all the resources they need, so we're also happy to provide custom services.

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brinkercapital.com 800.333.4573 1055 Westlakes Drive / Suite 250 / Berwyn, PA 19312