

A photograph of a classical building facade, likely a government or institutional building. The image shows a large, fluted column on the left, a window with a decorative frame in the center, and another column on the right. The architecture features intricate carvings and a series of smaller columns at the top. The lighting is warm, suggesting a sunset or sunrise.

INVESTMENT PHILOSOPHY

Making disciplined decisions



A close-up photograph of several wooden printing blocks. The blocks are arranged in a grid, with some featuring raised letters and a circular mark. The wood is dark and shows signs of wear and use. A blue diagonal shape is overlaid on the right side of the image, containing white text.

**Brinker Capital
isn't like other
investment
management
firms.**



Since 1987, the goal of Brinker Capital's independent approach has been to pioneer smarter investment options, thoughtful innovations, sensible research and useful technology.





Our approach is based on three core principles. They help us stay focused and flexible, so that every decision we make and every strategy we implement serves the investor.



Diversification

Innovation

Active Management

The background of the page is a dense field of tall, thin grasses in shades of blue and teal. Two large, white, triangular shapes are overlaid on the image, one pointing upwards and one pointing downwards, creating a central white space where the text is located.

Diversification

There is more than one way to be successful in investing. In fact, there are at least six.

We help protect and build wealth through a multi-asset class approach, using a strategy typically employed by endowments seeking to grow their investments over the long term.

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.¹

We also offer a **wide range of portfolios** to serve the different needs of different investors, from the most conservative to the most aggressive strategy, from mutual funds to absolute return vehicles.

This broad diversification translates into broader opportunities. It means investors have **access to products and strategies** that aren't generally available to individuals. It means they may see **reduced risk** and **increased returns** over the long term. It means that both their money and their confidence are well placed.

Brinker Capital Employs a Diversified Investment Approach



Source: Brinker Capital

¹ This strategy gives you more opportunities to grow your investments and less exposure to risk—no matter which way the market is moving.



Innovation

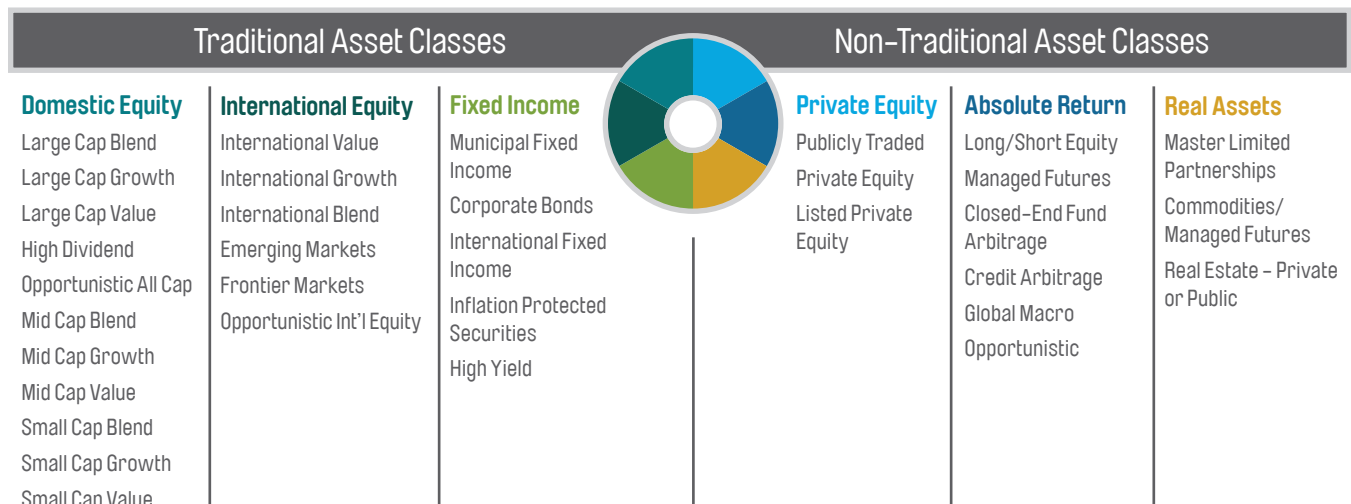
Following trends can get you lost. So we lead.

Because the portfolio investors have today won't be the same as the portfolio they have in five years, we continually look for ways to innovate.

We believe that the best way to inspire trust and confidence is to reinforce the support we provide. We look beyond typical style boxes, the usual investment classes, and popular fund managers for better strategies. An intensive, **team-based approach** enables us to generate ideas, drawing on our long **experience** and newest insights which strive to achieve consistent, risk-adjusted returns and downside protection over time.

We incorporate our best ideas into portfolios, so that they reflect our most up-to-date approaches for the short and long term. All of this supplies you with a ready source for intelligent, useful **solutions**.

Innovation in Portfolio Construction



Source: Brinker Capital

An aerial photograph of a lush green agricultural field, likely corn, with distinct rows of crops. A large white diagonal shape, resembling a stylized arrow or a cutout, is overlaid on the image, pointing from the top-left towards the bottom-right. The text 'Active Management' is centered within this white shape.

Active Management

Building a portfolio is just the beginning. So we stay with you, every step of the way.

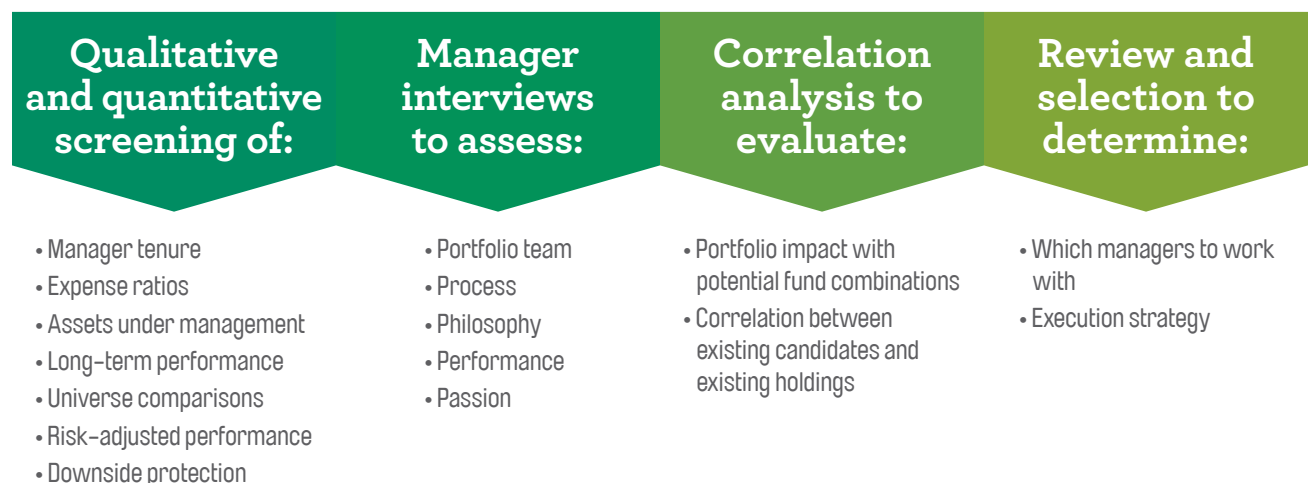
Because market conditions can change in the blink of an eye, we take an active approach to investing. That may mean capitalizing on inefficiencies, adapting investing styles, or implementing new strategies to take advantage of new market opportunities.

We apply rigorous initial and ongoing due diligence on underlying investment strategies each year to identify those that we believe best complement the portfolios while offering broad diversification and appropriate levels of risk. We carefully evaluate every asset manager and strategy that we recommend to make sure that they meet our standards for performance and integrity.

Likewise, an investor's needs, time horizon, risk tolerance, or tax situation may shift. We move quickly to ensure that their portfolio reflects these changes.

By staying **active and diligent**, we can help investors pursue their goals without missing potential opportunities.

Disciplined Due Diligence Process



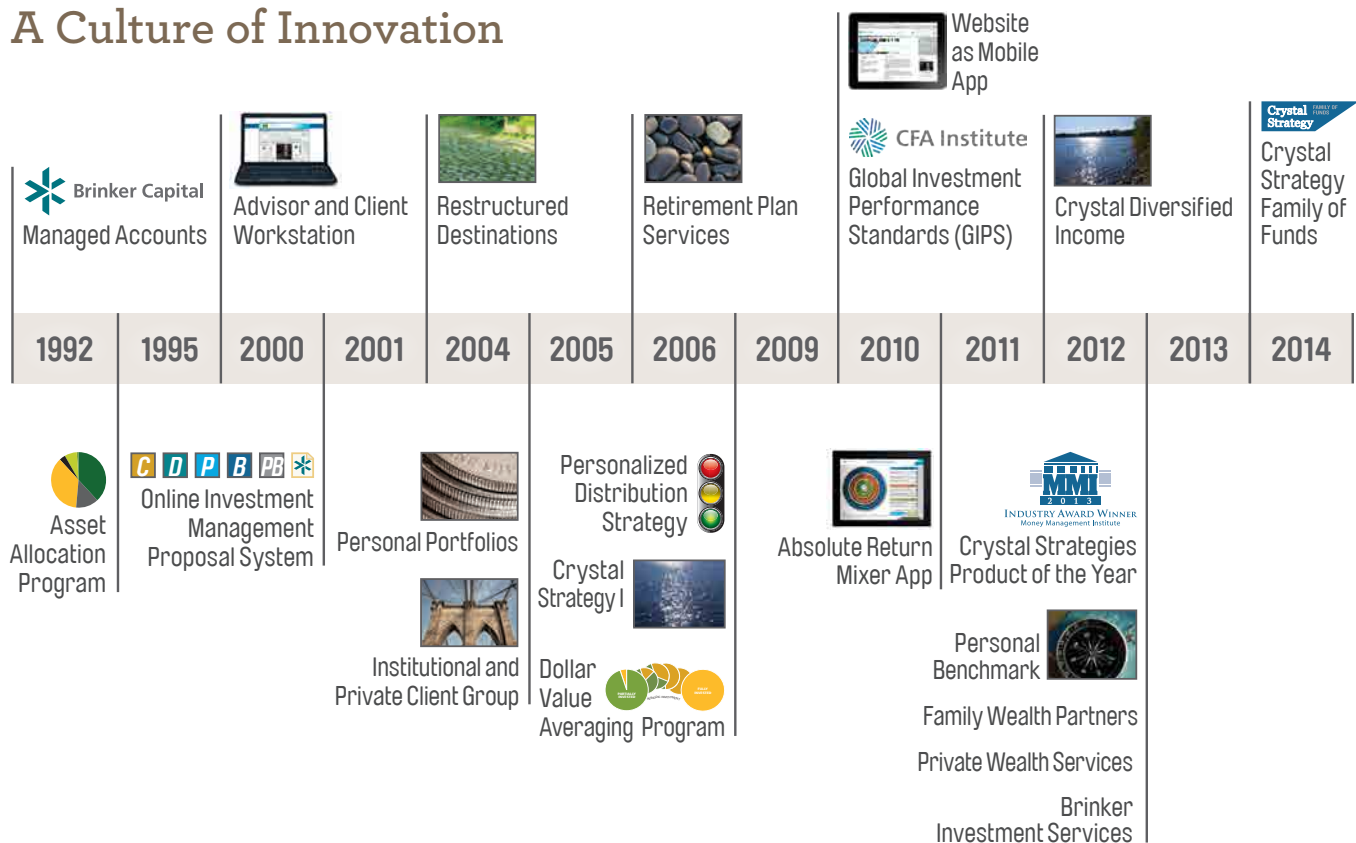


Redefining Investment Excellence™

To have confidence, you have to have choices.

Through the years, our sophisticated investment process has enabled financial advisors to provide an array of investment products and services that help meet the needs of individual investors, institutions, and family offices.

A Culture of Innovation





Brinker Capital. Redefining Investment Excellence™.

Since 1987, the goal of Brinker Capital's independent approach has been to pioneer smarter investment options, thoughtful innovations, sensible research and useful technology from our headquarters in suburban Philadelphia. And we're just getting started.

As an independent investment management firm, we're in the business of providing you with access to all of the resources, services, and choices you need.

With us, you'll gain the essential support to protect and grow your assets: a savvy partner, sound advice, and solid investment results.

Investment Philosophy

- **Diversification**
Multi-asset class approach
- **Innovation**
Bringing our best ideas
- **Active Management**
Disciplined due diligence process

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Connect With Us



Brinker Capital, Inc., a Registered Investment Advisor.

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. BRO_INVPHIL