Brinker Capital
Wealth Advisory

wealth management

Objective, comprehensive, customized

Your needs are unique and personal to your lifetime goals. We believe that your investment solutions should be, too.

Whether you are looking to leave a legacy for your family, build wealth for retirement or invest in tax-efficient vehicles, working with an advisor and investment management firm that offers specialized investment solutions and life management services can help to make your goals a reality.

3 percent The additional amount of net return you may earn in your portfolio by working with an experienced financial advisor[1]

Your financial advisor will

- Work with you to identify goals, objectives, risk tolerance and time horizon
- Meet with you regularly to explain your investment progress and keep you informed
- Assist in re-evaluating your investment objectives as your needs change
- Coordinate activity between Brinker Capital and additional advisors

As an investor, you are best served when you

- Provide your advisor with all relevant information about your finances
- Determine your risk level and establish your financial goals and objectives
- Communicate any investment constraints or special situations
- Notify your advisor of any changes to your goals or life circumstances

Brinker Capital Wealth Advisory will

- Follow a disciplined multi-asset class approach to diversify your assets
- Perform extensive due diligence on each money manager considered for your portfolio
- Carefully select what we believe are the right investment vehicles
- Provide a dedicated client portfolio manager for ongoing pro-active investment support

A collaborative approach to manage your wealth and reach your investment goals

[1] Vanguard Advisor's Alpha, 2015

Comprehensive portfolio design

Working through financial advisors, Brinker Capital employs a multi-asset class investing approach to managing $18.8 billion[2] in wealth. We strictly adhere to our investment philosophy of **diversification**, **innovation** and **pro-active management** because we believe this will help to lessen your overall risk and allow you to enjoy steadier returns.

Our Wealth Advisory management process creates a **customized portfolio** integrating your investment objectives and your life goals to ensure that your assets are effectively meeting your needs.

Dedicated service and support

As your committed investment resource, your client portfolio manager will work with your advisor to:

Monitor your portfolio to ensure it reflects your investment objectives	**Provide** reallocation advice as market conditions warrant	**Recommend** adjustment to your investment strategy if your financial situation changes	**Keep you abreast** through market and economic updates

Additional services available to you are: [3]

Customized tax transition strategies	Income distribution approaches	Concentrated stock position solutions

Options strategies	Socially responsible investing	Wealth transfer solutions	Philanthropic assistance

Your wealth management partner for better investment outcomes

1. **Talk** with your advisor to discuss how the Brinker Capital partnership can help you meet your dynamic investment needs
2. **Learn** more about Brinker Capital Wealth Advisory at www.brinkercapital.com
3. **Follow** the Brinker Blog for the latest market commentary from our investment professionals

Brinker Capital

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great **ideas** + strong **discipline** = better **outcomes**

[2] Assets under management as of September 30, 2016.
[3] Full range of services available to qualifying investors only. Please speak with your financial advisor for further details.