



Brinker Capital completes implementation of VestmarkONE® to improve advisor experience and accelerate business growth

Vestmark's groundbreaking unified managed account (UMA) technology helps Brinker Capital to accelerate advice distribution and improve investor outcomes

Wakefield, MA – November 2016 - Vestmark, the leading provider of Unified Wealth Management® solutions announced that Brinker Capital, a leading investment management firm focused on multi-asset class investing, has completed implementation of the award-winning unified wealth management technology platform VestmarkONE® to improve scale and the delivery of Brinker Capital's UMA program across 62,000 accounts and 3,800 advisors. Today, the solution services \$16.4 billion for the firm.

VestmarkONE® enables Brinker Capital to improve the advisor experience and drive home office efficiency by providing access to third-party managers and granting flexibility to construct and report on customized portfolios in line with investor objectives. The platform's support for UMAs enables Brinker Capital to flexibly integrate SMA managers and strategies, equities, as well as ETFs and mutual funds into a UMA account structure.

"A key component of Brinker Capital's investment philosophy includes meaningfully blending active and passive investment strategies," said Avery Cook, CIMA®, Senior Vice President of Managed Products and Solutions at Brinker Capital. "The VestmarkONE® technology supports our Core Guided program, which includes active fixed income SMA managers. Fixed income in UMAs are mostly mutual funds or characteristic-based model delivery, investors now benefit from active SMA fixed income management which is important during times of interest rate uncertainty."

"By partnering with Brinker Capital we are able to offer advisors an end-to-end solution that ultimately helps investors achieve their wealth goals," said John Lunny, Chief Executive Officer of Vestmark. "For almost 30 years, Brinker Capital has delivered investment products that enable advisors to fulfill the investment needs of their clients, and this partnership enables both parties to continue to carry out this mission. We look forward to our continued collaboration and to finding new ways to drive advisor efficiency."

"Brinker Capital selected Vestmark not only because of the industry leading UMA functionality the platform supports, but also their commitment to continuous innovation," said Brendan McConnell, Chief Operating Officer at Brinker Capital. "Vestmark has a strong culture and proven ability to deliver engaging technology solutions that provide better outcomes to advisors and their clients."

About Brinker Capital

Since 1987, Brinker Capital has provided investment solutions based on ideas generated from listening to the needs of advisors. From being a pioneer of multi-asset class investments to using behavioral finance to manage the emotions of investing, our disciplined investment approach is the key to helping investors achieve better outcomes.

Learn more at www.BrinkerCapital.com.

Brinker Capital, Inc. is a Registered Investment Advisor.

About Vestmark, Inc.

Vestmark is the premier technology provider for comprehensive unified wealth solutions utilized by financial advisors and institutions. Vestmark provides VestmarkONE, the award-winning technology platform, to help clients gather more assets, increase operating efficiency, and minimize risk. Since 2001, the platform has grown to manage over 1 million accounts, representing over \$350 billion in assets under management.

For more information about Vestmark's solutions, call (781) 224-3640, email inquiry@vestmark.com, or visit www.Vestmark.com.