

# your client service team



Serving: CT, MA, ME, NH, RI,  
Upstate NY (Adirondacks &  
Capital District), and VT



A team of investment professionals dedicated to meeting your needs

#### Overall relationship management



**Jason Shevland, CIMA®**

V.P., Regional Director  
800.601.4573  
jshevland@brinkercapital.com

#### Sales, new business, and asset conversion



**Marc Tobias**

Investment Consultant  
ext. 1103  
mtobias@brinkercapital.com

#### Asset allocation and manager selection recommendations



**Colton Growney**

Investment Strategy Analyst  
ext. 1176  
cgrowney@brinkercapital.com

#### Service questions on new and existing accounts

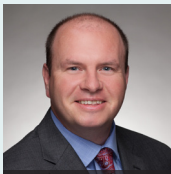


**Frank Shump**

Client Services Rep.  
ext. 1189  
fshump@brinkercapital.com

## Additional services

#### Wealth Advisory



**Denis McCartan**

Relationship Manager  
ext. 1194  
dmccartan@brinkercapital.com

#### Retirement Plan Services



**Frank Randall**

Regional Director  
508.330.2687  
frandall@brinkercapital.com

# 800.333.4573

[BrinkerCapital.com](http://BrinkerCapital.com)

1055 Westlakes Dr., Suite 250  
Berwyn, PA 19312

Connect

Brinker Capital, Inc.,  
a registered investment advisor.

Great Ideas + Strong Discipline = Better Outcomes™

TEAM\_JMS