helping to protect & manage your wealth

Brinker Capital
Wealth Advisory

Collaborative, comprehensive, customized

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

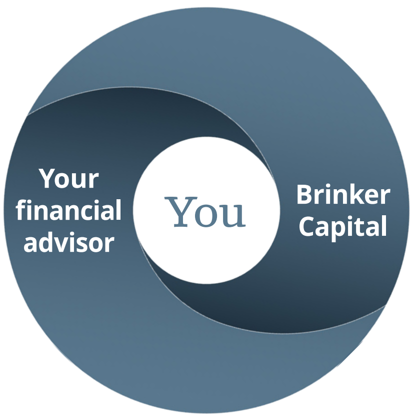
Whether you are looking to leave a family legacy, build wealth for retirement, or invest in tax-efficient vehicles, working with a financial advisor and an investment management firm offering goals-based investment solutions can help you achieve your objectives.

Experienced advisors not only bring knowledge to help guide your financial planning, but may also increase your portfolio net annual return by three percent.[1]

Brinker Capital follows a collaborative, comprehensive and customized approach to help protect and manage your wealth today and for years to come.

Collaborative approach

While Brinker Capital Wealth Advisory and your advisor are independent of one another, they take a **collaborative approach** to helping you reach your investment goals. Brinker Capital supports your advisor by acting as a fiduciary and monitoring your assets to make adjustments as warranted by the markets and your financial plan. That is why it is so critical to have an ongoing dialogue with your advisor so that all parties can work effectively to meet your unique needs.



Your financial advisor will

- Work with you to identify goals and objectives, risk tolerance and time horizons
- Meet with you regularly to discuss your portfolio and re-evaluate your investment objectives as your needs change
- Coordinate activity between Brinker Capital and additional advisors

As an investor, you are best served when you

- Work with your advisor to understand your investment needs and establish goals and objectives
- Communicate investment constraints or special situations
- Notify your advisor of changes to your goals or life circumstances

Brinker Capital will

- Build a portfolio specific to your needs and risk tolerance following a disciplined multi-asset class approach
- Pro-actively monitor each investment strategy in your portfolio
- Provide a dedicated client portfolio manager for ongoing investment support

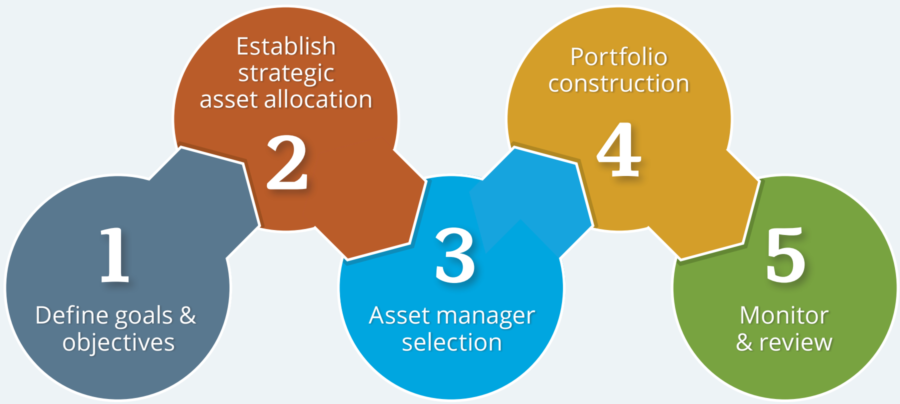
[1] Vanguard Advisor's Alpha, 2015

Comprehensive portfolio design

For 30 years, Brinker Capital has employed a multi-asset class investing approach to managing \$18.3 billion[2] in wealth. Brinker Capital designs **comprehensive portfolios** using the Wealth Advisory managment process that strictly adheres to the investment philosophy of diversification, innovation and pro-active management to help lessen your overall risk and allow you to enjoy steadier returns.

The Wealth Advisory management process

Diversification | Innovation | Pro-active management



Customized for your needs

Wealth Advisory works with you to create a diversified, **customized portfolio** integrating your investment objectives and goals.

As your needs evolve, your client portfolio manager is dedicated to monitoring your portfolio to ensure it is meeting your unique objectives and will also provide you with timely updates.

Monitor your portfolio to ensure it reflects your investment objectives

Provide reallocation advice as market conditions warrant

Recommend adjustments 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 a partnership with Brinker Capital 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

BrinkerCapital.com

1055 Westlakes Drive, Suite 250
Berwyn, PA 19312
800.333.4573

Connect With Us

BLOG

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

[2] Assets under management as of December 31, 2016.

[3] Full range of services available to qualifying investors only. Please speak with your financial advisor for further details.