

# Personal Portfolios



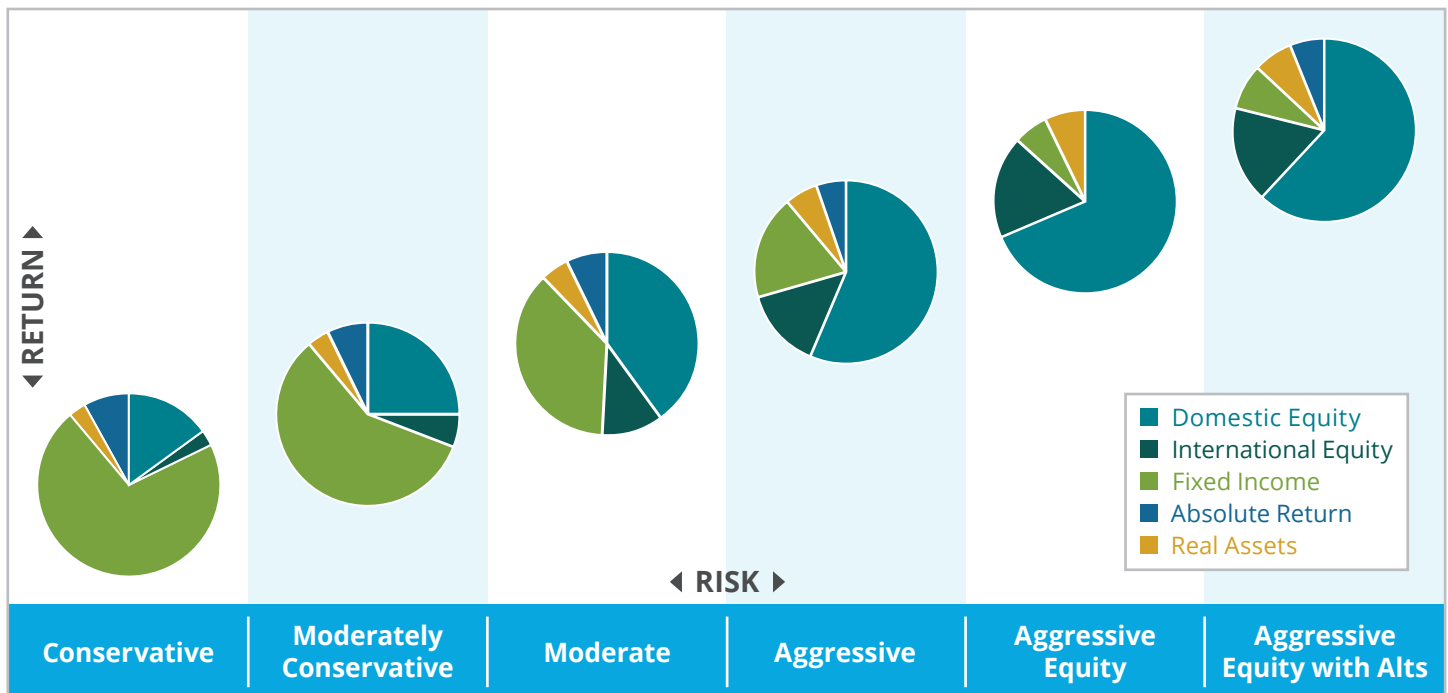
Personal Portfolios offers multi-asset class allocation strategies to fit each investor's needs. Each strategy offers a flexible range of underlying investments consistent within the investors' established risk and return parameters.

## About Personal Portfolios

- Strategies designed to meet a range of investor risk tolerances
- Utilizes a multi-asset class approach to seek consistent risk-adjusted returns and downside protection over time
- Strategies are built on the concepts of diversification, innovation and active management

## About Brinker Capital

- One of the industry's leading independent providers of managed account and mutual fund investment services
- Founded upon a multi-asset class investment philosophy to provide diversification and purchasing power to investors
- Focused on providing better outcomes through innovative investment solutions



Source: Brinker Capital. Data as of 3/31/17.

## Tax Transition feature

The Personal Portfolios tax transition feature seeks to equipt investors with strategies to regulate tax, risk and allocation consequences of portfolio transactions. Then our experienced management team will review those risk

tolerances, objectives and tax management priorities to develop a well-diversified portfolio with an effective strategy to meet the investor's individual needs.

## Great Ideas + Strong Discipline = Better Outcomes™

At Brinker Capital we implement great **ideas** with a **disciplined** investment approach to consistently offer financial advisors forward-thinking solutions with the goal to achieve better **outcomes** based on their clients' personal goals.

## Portfolio management team



**Andrew Rosenberger, CFA**  
*Senior Investment Manager  
12 years industry experience  
B.S. Pennsylvania State University*

The Asset Allocation charts shown reflect Brinker Capital Inc's target asset allocation policy as of March 31, 2017, for qualified investments of \$100,000-\$500,000. Strategies for taxable assets and investments in excess of \$500,000 may vary slightly. Target weightings and actual allocations will change over time. Allocation may not add to 100% due to rounding of asset class and fund allocation percentages.

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 2A from a Brinker Capital Client Services representative at 800.333.4573 or at [clientservice@brinkercapital.com](mailto:clientservice@brinkercapital.com). Brinker Capital does not render tax, accounting, or legal advice.