

## Executive management



**Charles Widger**  
*Founder & Executive Chairman*

Mr. Widger is the founder of Brinker Capital and has over 39 years of experience working with investors in strategic investment planning and manager search and monitoring. He is a past chairman of the board of trustees for Gettysburg College and is chair-emeritus of the Money Management Institute, the \$4.2 trillion dollar managed account industry's association. He is also the past chairman of the Villanova University Charles Widger School of Law Board of Consultants. Earlier in his career, he practiced law in Pennsylvania in private practice and as an assistant attorney general for the Pennsylvania Department of Justice. Mr. Widger is co-author of the New York Times best-selling book, *Personal Benchmark: Integrating Behavioral Finance and Investment Management*. Mr. Widger is a graduate of Gettysburg College and Villanova University Charles Widger School of Law and holds an L.L.M. in Taxation from Boston University's School of Law. He served as a Lieutenant in the U.S. Navy.



**John E. Coyne, III**  
*Vice Chairman*

Mr. Coyne leads Brinker Capital's initiative to broaden distribution into new marketplaces, a key part of the firm's strategic plan. Previously, Mr. Coyne served as president of Brinker Capital and was responsible for policy and oversight for sales, marketing, and key account management. In addition, John served as chief compliance officer and has held a variety of regional and national sales positions at the firm, including that of national sales director. John has 36 years of industry experience. He is a board member and executive committee member of the Money Management Institute and the recipient of its 2011 Pioneer Award. John is chair of the Gateway to Leadership Foundation which seeks to

provide internships to minorities in the financial services field and board member of CommonLit, an educational technology provider to middle school teachers. He is also chairman emeritus and current board member for the Philadelphia Chapter of Teach for America and a member of the Philadelphia chapter of the Financial Planning Association. John is a frequent speaker and host at industry conferences and has been quoted extensively in top financial and advisor media. In addition to appearances on Bloomberg, Fox Business News and Fox Business's "Cavuto on Business", John's thoughts have appeared in The Wall Street Journal, Newsweek, InvestmentNews, Fund Fire and many others.



**Noreen D. Beaman, CPA**  
*Chief Executive Officer*

Ms. Beaman is the chief executive officer of Brinker Capital, Inc. and is responsible for developing and executing the firm's detailed operating plan and for the oversight of the company's short and long term strategies. Previously, Noreen served as the firm's chief operating officer responsible for policy and oversight of operations, administration, performance, reconciliation, technology, and human resources. Noreen has more than 26 years of investment experience working with financial advisors and institutional and high net worth investors in strategic planning and investment management. Additionally, she is a member of the firm's investment, management, and finance committees. As one of Brinker Capital's original partners, Noreen previously held a variety of regional and national sales positions at the firm, including new business development and client service in New York and New Jersey. Noreen is a frequent speaker at industry conferences and has been quoted extensively in top financial and advisor media. Prior to joining Brinker Capital, Noreen was treasurer at Mutual Benefit Capital Companies, a subsidiary of Mutual Benefit Life Insurance Company. She also worked at Ernst and Young. Noreen is a graduate of Saint Peter's University and is a member of their Board of Trustees.

# Management team



**Avery Cook, CIMA®**  
*Senior Vice President,  
Managed Products and  
Solutions*

With over 16 years of industry experience, Avery is primarily responsible for the evaluation, implementation and maintenance of product offerings at the firm. Prior to his current role at Brinker

Capital, Avery served in various positions within the firm's performance and reconciliation, pricing, client services and operations departments. Avery is a graduate of Hamilton College, where he majored in Economics and Computer Science with a minor in Government. He is a member of the Investment Management Consultants Association and was awarded its Certified Investment Management Analyst (CIMA®) designation and also earned a Lean Six Sigma certificate from Villanova University. In addition, he holds FINRA series 7, 24, 53, 63 and 65 licenses. Outside the office, he enjoys coaching high school lacrosse and playing golf.



**Brian Ferko**  
*Chief Compliance Officer*

Brian has over 22 years of experience in compliance and operations in the financial services industry. He previously served as chief operating officer at Cipperman Compliance Services where he was responsible for day-to-day operations

and management of the compliance services offered by the firm. Prior to that he was head of U. S. compliance and chief compliance officer for Aberdeen Asset Management Inc. and chief compliance officer for Aberdeen Fund Distributors LLC where he was responsible for the supervision, management, planning and coordination of the firm's compliance and supervisory responsibilities. Prior to that, Brian served as chief compliance officer for BHR Fund Advisers and the BHR Institutional Funds. At BHR, a start-up investment management firm, he developed the compliance program, policies and procedures

manual, conducted risk assessments and directed all areas of testing and monitoring to comply with Investment Company Act and Investment Advisor Act regulations. Prior to his time at BHR, Brian worked for Ardmore Investment Partners as the chief compliance officer and head of mutual fund administration and Turner Investment Partners as director of mutual fund compliance and administration. Brian started his professional career at SEI Investments in account management and the retail transfer agency. Brian is a graduate of LaSalle University.



**Philip F. Green, Jr., MBA**  
*Chief Financial Officer*

Phil is responsible for all financial operations of the firm. He also oversees the registered investment advisor services department, focusing on providing solutions and support to that marketplace and is a member of the management

team. Phil has been with Brinker Capital for 12 years in various capacities of operations, finance and accounting. He has 22 years of industry experience which includes prior work at a number of large financial and insurance institutions in the commercial underwriting disciplines including AIG, Liberty Mutual, and Citibank/Travelers. He received his B.S. in Finance and Economics from Pennsylvania State University and his M.B.A. from Villanova University. Phil holds his FINRA series 7 and 27 licenses. He sits on the technology board at the St. Eleanor School, in Collegetown, PA, and is a member of the Money Management Institute, the managed account industry's association. Phil enjoys reading, biking, skiing, hiking, basketball, and running.

## Management team (continued)



**Christopher P. Hart, MBA**  
*Senior Vice President, Head of Platform Manager Research*

With over 19 years of industry experience, Chris is responsible for the overall investment management of Brinker Capital's SMA platform, Core Asset Manager. This involves new manager selection, on-going manager due diligence, manager

termination decisions, and asset allocation using the Core universe of SMA, mutual funds, ETFs, and proprietary discretionary managed accounts. Chris is the chairman of the Brinker Capital manager selection committee. Prior to joining Brinker Capital, Chris served as the investment officer for U.S. growth strategies within the investment advisor research department at Morgan Stanley. He also held roles at RS Investments, Haverford Financial Services, Credit Suisse, and Prudential Securities. Chris obtained his M.B.A from the Darden Business School at the University of Virginia, and B.A. in Economics from Trinity College. In addition, Chris holds FINRA series 7 and 66 licenses.



**Edward Kelly, AIF®**  
*Executive Vice President of National Sales*

Ed joined Brinker Capital in 2012 and currently serves as executive vice president of national sales. In his role, Ed oversees all sales functions that support the insurance-based, bank and independent broker dealer

channels. Ed is a member of Brinker Capital's operating committee and executive committee, and brings over 20 years of expertise in the financial services industry to the teams. Prior to joining Brinker Capital, Ed served as senior regional consultant for Genworth Wealth Management, as well as vice president of sales for Atlantic Trust. He also held positions at Nationwide and Curian Capital. He holds FINRA series 7, 24, 63, and 66 licenses and is a graduate of Villanova University. He is also an Accredited Investment Fiduciary (AIF). He enjoys golfing, basketball and spending time with his wife, Jody, and two children, Sophia, and Ed.



**Roddy P. Marino, CIMA®**  
*Executive Vice President, National Accounts and Distribution*

Roddy has over 20 years of sales experience and an extensive background of building successful distribution channels. As executive vice president, Roddy is responsible for distribution and positioning of Brinker Capital's products and services with the

firm's strategic business partners. Prior to joining Brinker Capital, Roddy was the managing director and head of advisory sales at Allianz Global Investors. He was responsible for all aspects of distribution within the wirehouse, independent broker dealer and RIA channels. He also held sales leadership positions at Chartwell Investment Partners and Turner Investment Partners. Roddy earned a B.S. in Economics from the University of Virginia. He is a member of the Investment Management Consultants Association and was awarded its Certified Investment Management Analyst (CIMA®) designation and is FINRA series 7, 24, 63 and 65 licensed.



**Ali McCarthy, MBA**  
*National Director of Marketing, Brinker Capital & President, The Center for Outcomes*

Ali is the national marketing director and a member of the executive committee at Brinker Capital. She is a strategic thinker who leads the marketing and communication development efforts of the firm. In addition

to business development efforts, she directs media relations, branding, social media content, advertising, fulfillment, video and website content. In 2016, Ali launched The Center for Outcomes, an innovative Brinker Capital advisor educational forum designed to help financial professionals grow their business. Ali is a member of the Women in Insurance & Financial Services national and Philadelphia/Tri-County Pennsylvania chapters and a member of the Money Management Institute's Membership Experience Committee. Ali has more than 16 years of marketing experience in the financial services industry. Ali earned her M.B.A. from Texas A&M University and B.S. from Purdue University and holds FINRA series 6, 63, and 26 licenses. Ali is currently a PhD student at Capella University, pursuing a doctoral degree in Advanced Studies in Human Behavior.

## Management team (continued)



**Brendan McConnell**  
*Chief Operating Officer*

Brendan was named Brinker Capital, Inc.'s chief operating officer in June 2014. In his role, he is responsible for account administration, operations, administration, performance and reconciliation, technology, IT and client services. He is the chair of

Brinker Capital's operating committee and a member of the executive, technology, custodian and finance committees. He has several years of experience as an operations manager, where he was responsible for all operational aspects of the firm's relationship with Fidelity IWS and Fidelity Clearing & Custody Solutions. Brendan has driven a strong track record of results, execution excellence and improved efficiency while also enhancing the company's client experience. Brendan is a graduate of Saint Joseph's University. He is also certified through Villanova University as a business analyst and in Lean Six Sigma along with holding FINRA series 7, 24, 63, and 65 licenses. He enjoys spending time with his family, reading, running, and playing golf.



**Jason B. Moore, MBA**  
*Chief Administrative Officer*

With over 20 years of investment advisory experience, Jason joined Brinker Capital in June 2016 as chief administrative officer of the investment department. Jason is responsible for working with the investment team and the sales and distribution teams

to apply Brinker Capital's disciplined multi-asset class investment process to build solutions for financial advisors and their clients. Prior to joining Brinker Capital, Jason was a managing director and head of Morgan Stanley Wealth Management's Consulting Group. In this role, he was responsible for leading the industry's largest advisory platform with focus on strategic policy development, management of investment products, risk oversight and sales distribution efforts. Jason held other roles at Morgan

Stanley Wealth Management that included product and investment management responsibilities. Jason was also a managing director at Merrill Lynch where he was responsible for management of their unified managed account, separately managed account, and mutual fund advisory businesses. Jason earned his B.S. in Business Administration as well his M.B.A. from the University of Delaware. In addition, he holds his FINRA series 7, 66, and 24 licenses. Outside of the office, Jason enjoys spending time with his family and coaching travel softball.



**Jeff Raupp, CFA, MBA**  
*Director of Investments*

With over 20 years of investment experience, Jeff is primarily responsible for the portfolio management for Brinker Capital's mutual fund and retirement plan services programs. Jeff is the chairman of Brinker Capital's asset allocation committee,

which sets policy for portfolio construction and asset allocation in portfolios, and is also a member of the management committee and manager selection committee. Prior to his current role, Jeff served as the operations manager for Brinker Capital and was in charge of all operational aspects of the firm's relationship with Fidelity IWS and Fidelity Clearing & Custody Solutions. Before joining Brinker Capital, Jeff was employed as an electronic engineer and project manager for a small electronics firm. He also served as an officer in the United States Army. Jeff has a B.S. in Mechanical Engineering from the University of Delaware and a M.B.A in Finance from Villanova University. In addition, he is certified in Lean Six Sigma through Villanova University and holds FINRA series 7 and 66 licenses. He is a member of the CFA Institute and the CFA Society of Philadelphia.

## Management team (continued)



**John Solomon**  
*Executive Vice President,  
Wealth Advisory*

With over 21 years of experience in the financial services industry, John is responsible for leading the Wealth Advisory team at Brinker Capital. In this role, John works collaboratively with his team to set and implement strategic

direction while focusing on communicating value and growing assets under management. John is a member Brinker Capital's management team and operating committee. Prior to joining Brinker Capital, John was senior vice president of sales and client service at InvestorForce, Inc. He also spent 11 years at SEI Investments, the majority of that time working with investment advisors. John is a graduate of the University of Pittsburgh, with a B.S. in Applied Mathematics, and has also completed courses at The Wharton School of Business as part of its Executive Education program. He holds FINRA series 7 and 66 licenses. John enjoys spending time with his wife, Michelle, son, Brad and daughter, Delaney.