



Brinker Capital

COMPANY OVERVIEW



Multi-asset class investment solutions designed to **drive better outcomes**



People first

We serve over **5,500 financial advisors**

Over **160 investment and service professionals** with an average of 8.5 years of service at Brinker Capital

Best Places to Work in Money Management in 2019 by *Pensions & Investments*

Privately owned and operated

Over **80** highly vetted investment **manager partners**

Nearly **\$2 million** spent annually on manager and investment **research**

Independent



Entrepreneurial spirit

Founded in 1987 with a 25 year portfolio track record

Range of investments, including high net-worth and goals-based solutions

93% investor retention rate within Brinker Capital Wealth Advisory

6,000+ advisor calls answered each month

Over **78%** of investment professionals are **CFA Charterholders**

Service driven



Focused on outcomes

More than **62,000 investors** have entrusted us with their wealth

Ranked 10th in **Barron's 2018 Best Fund Families**

\$25.3 billion in assets under management*

* As of 12/31/2019.