PRESS RELEASE

Brinker Capital

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Brinker Capital Wealth Advisory Strengthens Offering by Lowering Investment Minimum and Expanding Team

BERWYN, Pa. (Sept. 06, 2018) – Brinker Capital, a leading investment management company focused on multi-asset class investing, today announced enhancements to its Wealth Advisory services, including a new lower investment minimum of $1 million and the addition of two key hires: Mitch Kerr, CFA, Vice President, Senior Portfolio Manager and Sarab Shamoon-Springer, Director, Wealth Planning Solutions.

Brinker Capital Wealth Advisory (Wealth Advisory) works with financial advisors to provide tailored investment solutions for high net worth and institutional investors. Featuring a full suite of services and solutions for its clients, Wealth Advisory includes access to a dedicated portfolio management team, tax management and transition solutions, robust reporting, and access to partners specializing in alternative investments, banking and lending, business valuation, ESG solutions, philanthropic services, and trust services.

“By making platform and personnel enhancements, we are pleased to be able to lower our minimums and offer Brinker Capital’s Wealth Advisory services to more financial advisors and clients,” said Jason Moore, Chief Administrative Officer at Brinker Capital. “This change was possible because of our commitment to and investment in both people and technology to enhance our service offering.”

The Wealth Advisory team empowers advisors to offer their clients a tailored investment experience with full pre- and post-sale support through a three-stage process: Discover, Design, Deliver.

- Discover: through a single point of contact, advisors and clients receive personalized and comprehensive support to ensure a full understanding of investment goals and desired outcomes
- Design: the Wealth Advisory team constructs a tailored investment experience and works to ensure the portfolio remains focused on achieving its desired outcomes
- Deliver: clients and advisors receive continuous portfolio reviews, robust reporting, and proactive communications from a dedicated portfolio manager

The Wealth Advisory team is comprised of portfolio consultants, account executives, portfolio managers, and investment strategists who work in conjunction with Brinker Capital’s regional directors to serve high net worth and institutional investors across the United States. The team is managed by Moore and Thomas K.R. Wilson, CFA, Head of Wealth Advisory.

As a Senior Portfolio Manager, Kerr is responsible for strategy planning and communicating the multi-asset class investment philosophy for Wealth Advisory clients. He brings more than 17 years of industry experience to Brinker Capital. Prior to joining the company, he was a Senior Investment Advisor at TD Private Client Wealth, where he was responsible for portfolio construction and asset management for institutional and high net worth clients. Additionally, he worked at Wells Fargo Private Bank as a Senior Investment Strategist and at Gardner Lewis Asset Management as an Equity Research Analyst. Kerr reports to Wilson.

As Director, Wealth Planning Solutions, Shamoon-Springer is responsible for enhancing the company's goals-based platform and management of the partner services platform for high net worth clients in Wealth Advisory. She has more than 10 years of investment management experience and most recently worked at Morgan Stanley Wealth Management as a Financial Planning and Goals-Based Planning Solutions Specialist. During her time at Morgan Stanley, she was responsible for educating financial advisors on how to integrate goals-based financial planning into their practice and align financial planning with portfolio construction/management to create a holistic wealth management experience. Shamoon-Springer reports to Moore.

"With the addition of Mitch and Sarab, we are better positioned to serve our Wealth Advisory clients," said Wilson. "It's an exciting time at Brinker Capital as we empower financial advisors with the investments, technology, and support needed to remain focused on what matters most in their business – their clients."

About Brinker Capital
Brinker Capital is a privately-held investment management company with $22.2 billion in assets under management (as of June 30, 2018). For 30 years, Brinker Capital's purpose has been to deliver an institutional multi-asset class investment experience to individual clients. Brinker Capital's highly strategic, disciplined approach has provided investors the potential to achieve their long-term goals while controlling risk. With a focus on wealth creation and management, Brinker Capital serves financial advisors and their clients by providing high-quality investment manager due diligence, asset allocation, portfolio construction, and client communication services. Brinker Capital, Inc. is a registered investment advisor.

Learn more at BrinkerCapital.com and twitter.com/BrinkerCapital.