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Brinker Capital Announces Strategic Partnership and Investment in BizEquity

Partnership empowers financial advisors with patented BizEquity business valuation service to help advisors capture share of \$7 trillion-dollar business owner wealth transfer over the next 10 years

BERWYN, Pa. (Oct. 1, 2018) – Brinker Capital, a leading investment management company focused on multi-asset class investing, today announced an equity investment and distribution partnership with BizEquity, the world’s largest online business valuation service*, to provide financial advisors and registered investment advisors access to the tools to develop business valuation analysis for their clients.

In an effort to further expand its service offering to advisors who access Brinker Capital products through its Wealth Advisory and RIA Services units, Brinker Capital leverages BizEquity’s cloud-based technology to deliver in-depth business valuation paired with industry analysis powered by big data. In doing so, Brinker Capital is able to effectively and efficiently guide advisors and their business owner clients through the financial decision-making process.

“The investment in BizEquity reinforces our commitment to providing innovative solutions and services to advisors and their clients,” said Noreen D. Beaman, CPA, Chief Executive Officer at Brinker Capital. “With 98% of business owners unaware of the true value of their business, it’s critical that advisors be equipped with the proper business planning tools and resources. By partnering with BizEquity, we’re able to provide advisors with a realistic valuation of their clients’ business which better positions the advisor to offer advice tailored to their clients’ needs.”

“There is clear alignment in the strategic vision and culture of the two companies,” said Michael M. Carter, Founder and Chief Executive Officer at BizEquity. “Brinker Capital’s investment in our company will empower even more advisors with access to our state-of-the-art digital technology used to drive the results of the business valuation report.”

About Brinker Capital

Brinker Capital is a privately-held investment management company with \$22.9 billion in assets under management (as of August 31, 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.

About BizEquity

Founded in 2011, BizEquity is the world’s leading provider of business valuation knowledge and big data. Having valued over 33 million private businesses to date, BizEquity’s vision is to value every private business in the world, and in the process democratize business valuation and performance knowledge for all businesses and financial institutions.

Headquartered in Philadelphia, Pennsylvania, BizEquity has offices in key global markets including Singapore, Delhi, and Canary Wharf in London. It has over 440 financial institutions distributing its patented service offering and was recently named one of the top 360 private companies by Entrepreneur Media. BizEquity also won Bank Director's FinTech growth and innovation award, and its CEO Michael Carter has been named one of the top 100 leaders in Global Fintech, in addition to a top FinTech Influencer in the United States by Let's Talk Payments.

For more information, please visit <http://www.bizequity.com>.

While Brinker Capital does maintain an equity investment in BizEquity, Brinker Capital does not receive any direct compensation for the referral.

*Source: BizEquity