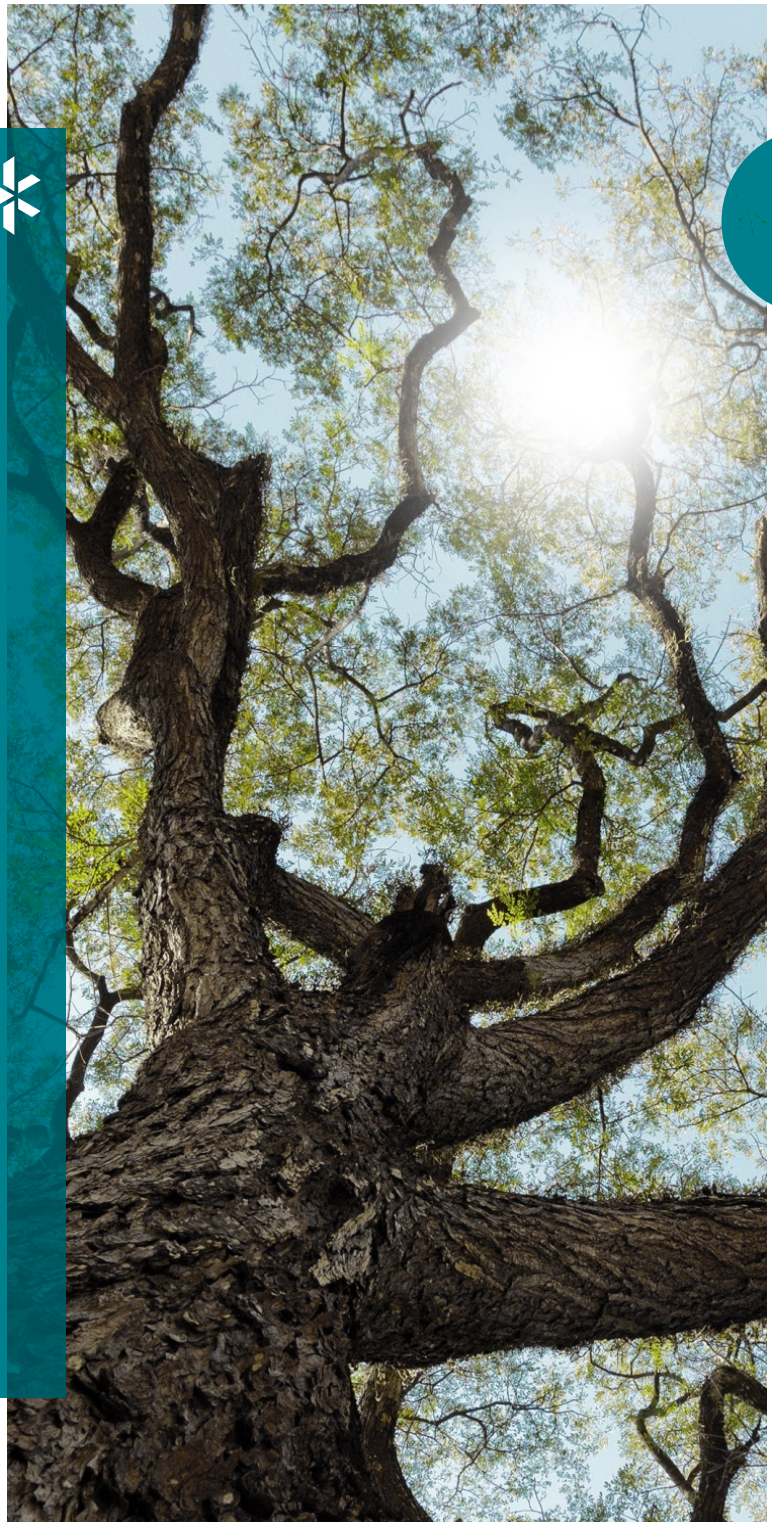
Brinker Capital
WEALTH ADVISORY

Manage and preserve your wealth

Experience better outcomes with Brinker Capital

- 30 years of wealth management experience
- Customized investment solutions
- Expect exceptional service



A wealth of **experience**

Brinker Capital has been building and managing fully customized portfolios for over 30 years.

We've cultivated a deep understanding of the nuances and complexities high net worth investors often face and developed innovative solutions to help drive better outcomes.

Views expressed are those of Brinker Capital. For informational purposes only.

Brinker Capital **core values**

Everything we do is focused on delivering better outcomes through our core values:

People first

160+ employees represent **74 colleges** from around the world

78% of investment professionals currently hold **CFA charters**

Independent

80+ investment manager partners

Entrepreneurial spirit

Founded in **1987**

Multi-asset class investment approach

Service driven

Over 99% of client service calls answered by a live person

Top Workplaces of 2019 by The Philadelphia Inquirer

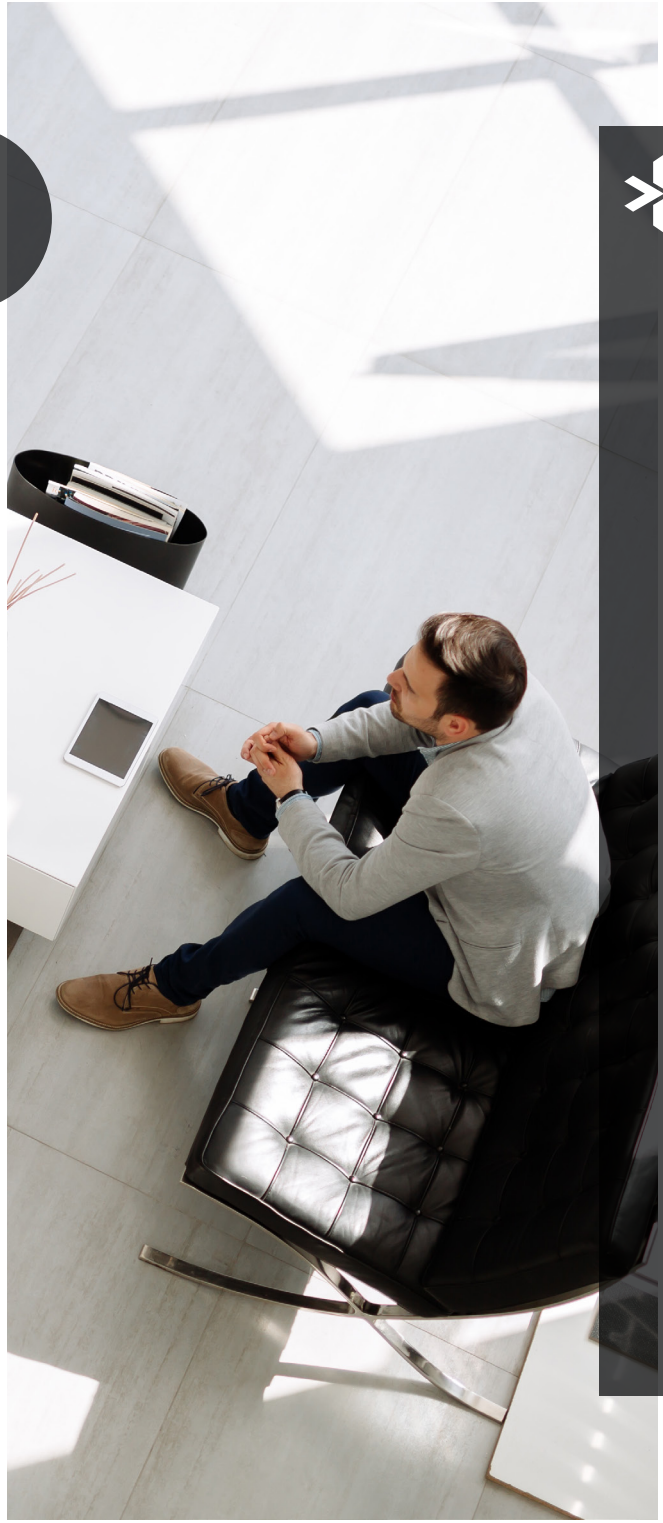
Focused on outcomes

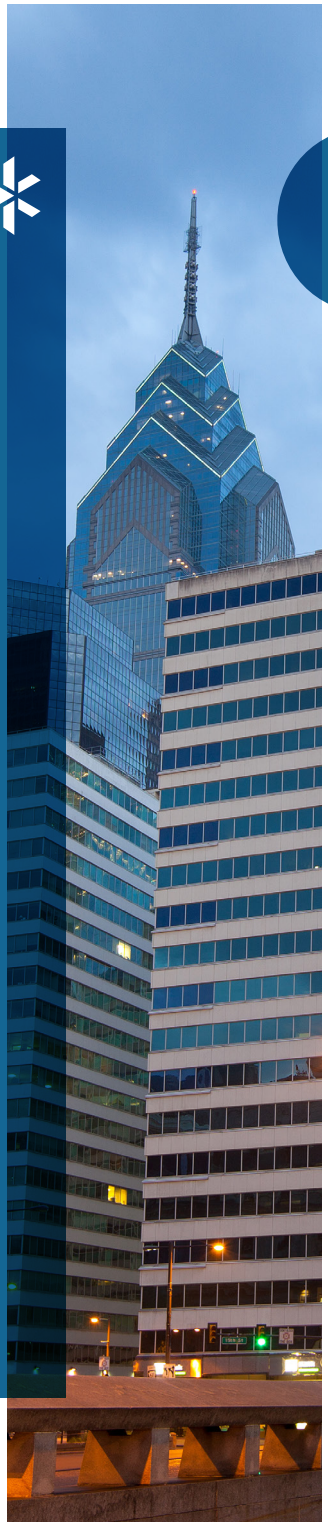
Over 58,000 investors - individuals, institutions, businesses, and families - **entrust us with their wealth**

All statistics sourced by Brinker Capital as of December 31, 2018. Client service call percentage accounts for calls recieved during normal business hours.

Expect **exceptional service**

Once you become a Brinker Capital Wealth Advisory client, your financial well being becomes our top priority. You'll have your own wealth management team that includes your financial advisor and direct access to a dedicated portfolio manager to help ensure that your wealth plan is working toward your goals. We'll provide straightforward market insights and communications to help you and your advisor stay informed.





Customized **investment solutions**

Your wealth picture - what you've achieved, where you want to go, and how you want to get there is uniquely your own. Brinker Capital Wealth Advisory works closely with you and your financial advisor to gain a comprehensive understanding of what is uniquely yours. We believe that a full analysis of your goals, objectives, and complete investment landscape is the best way to define the path forward.

Your tailored investment recommendation from Brinker Capital considers all aspects of your wealth plan, including:

- **Existing portfolio holdings, trusts, insurance, and other investments**
- **Short- and long-term investment goals**
- **Potential tax impacts and considerations**
- **Legacy and estate plans**

Our solutions leverage our list of vetted investment management partners to offer you a truly customized approach to managing your wealth.

Brinker Capital
WEALTH ADVISORY

BrinkerCapital.com
800.333.4573

Some additional services may be provided by firms that are unaffiliated with Brinker Capital.

Nothing contained herein is intended to constitute accounting, legal, tax, security or investment advice, nor an opinion regarding the appropriateness of any investment, nor a solicitation of any type.

The views and opinions expressed herein are those of Brinker Capital as of the date of writing and are subject to change with no obligation to update.

Investing in any investment product 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. There are no guarantees that investment strategies will perform as designed. Diversification does not assure a profit or protect against loss.

This document does not constitute a recommendation to buy or an offer to sell any security or investment strategy mentioned in this document. Any offer to invest in the firm's investment strategies can be made by a written agreement only. Before investing, an investor should carefully consider the portfolio objectives, risk, charges, and expenses.

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