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Brinker Capital

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Brinker Capital Wealth Advisory Exceeds $5 Billion in Assets Under Management

BERWYN, Pa. (Jan. 28, 2020) – Brinker Capital, a leading investment management company focused on multi-asset class investing, today announced that its Wealth Advisory division surpassed $5 billion in assets under management after the company made enhancements to the offering and reduced the investment minimum to $1 million in 2018.

"Over the past two years, we have spent a considerable amount of time and energy to make our Wealth Advisory offering a competitive, scalable high net worth solution for our advisors and their clients," said Noreen D. Beaman, Chief Executive Officer at Brinker Capital. "It's exciting to watch Wealth Advisory grow to an offering that provides financial advisors with the investments, technology, and service they need to remain focused on helping their clients achieve better outcomes."

Brinker Capital Wealth Advisory partners with financial advisors to provide tailored investment solutions for high net worth and institutional investors. Featuring a full suite of services and solutions, Wealth Advisory maintained a 96% client retention rate for the 2019 calendar year due in part to the team's expansion, successful portfolio management, ancillary services provided by industry partners, and enhancements to the company's advisor and end-investor platform, One Wealth Life.

The Wealth Advisory team is comprised of portfolio consultants, account executives, portfolio managers, and investment strategists - who work in conjunction with the company's regional sales directors - to provide full pre- and post-sale support for financial advisors across the United States. Additionally, the Wealth Advisory team works with a range of vetted industry partners that enable financial advisors to provide their clients with a holistic wealth experience, including:

- Banking and lending
- Business valuation
- Charitable giving
- ESG investment solutions
- Tax transition and management services
- Trust services

"By making strategic investments in personnel and our platform, as well as expanding our partner services offering, Brinker Capital has created a personalized investment solution that provides high-touch service which our advisors and clients really value," said Jason Moore, Chief Solutions Officer at Brinker Capital. "We feel the Wealth Advisory offering helps provide differentiation in the marketplace for the advisors we serve."

About Brinker Capital

Brinker Capital is a privately-held investment management company with $25.3 billion in assets under management (as of December 31, 2019). For over 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.