

## Destinations

Portfolios featuring dynamic asset allocation comprised of the Destinations Funds, a series of mutual funds constructed, and managed by Brinker Capital using third-party investment managers and strategies

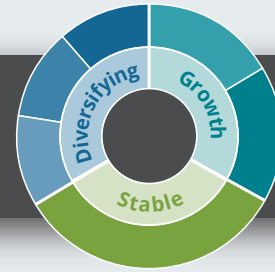
## Core Asset Manager

Managed account solution that offers a flexible investment experience through multiple ways to invest. Underlying investments may include separately managed accounts (SMAs), mutual funds, and exchange-traded products

## Wealth Advisory

Tailored portfolio management solutions and services for high net worth individuals, families, and institutions

# Multi-asset class



# investment solutions

- Risk-based portfolios
- Income-focused portfolios
- Goals-based strategies

### Additional services

- Customized contribution and distribution strategies
- Retirement Plan Services

**\$10,000 minimum**

### Core Guided portfolios

- Risk-based portfolios
- Income-focused portfolios
- Tax-managed portfolios
- Completion strategies

### Core Select

- Access to investment strategies that have been evaluated and approved through Brinker Capital's due diligence process
- Provides for investment strategies at reduced minimums, tax efficiency, and transparency

### Additional services

- Tax harvesting
- Ability to enact social restrictions

**\$500,000 minimum**

- Dedicated seasoned portfolio manager
- Income-focused portfolios
- Customized contribution and distribution strategies
- Tax management
- Active asset allocation advice
- Investment strategy due diligence

### Additional services\*

- Banking and lending
- Business valuation
- ESG solutions and services
- Trust services
- Philanthropic services
- Access to alternative investments

**\$1,000,000 minimum**

\*Some additional services may be provided by firms that are unaffiliated with Brinker Capital. Source: Brinker Capital. For use with intended audience only. CONTINUUM