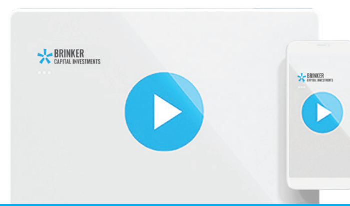
Tax Management

BRINKER
CAPITAL INVESTMENTS

A Tailored Approach To Tax Management For Every Investor

Leveraging tax-saving strategies to maximize after-tax returns, known as tax alpha, can have a meaningful impact on wealth accumulation. By working with Brinker Capital Wealth Advisory, your advisor has access to a team of specialists who can customize the appropriate tax strategy for you.



Watch Our Tax Management Video Here

Tax transition

Receive securities in-kind and gradually transition them into a more optimal solution over time, potentially avoiding or delaying realizing meaningful capital gains

Tax loss harvesting

Offset realized gains can reduce the overall tax burden by harvesting securities at a loss and investing the proceeds in similar replacement securities

Asset location optimization

By placing less tax-efficient investments in deferred tax or tax-free registrations, a portfolio can be structured to deliver more efficient after-tax returns

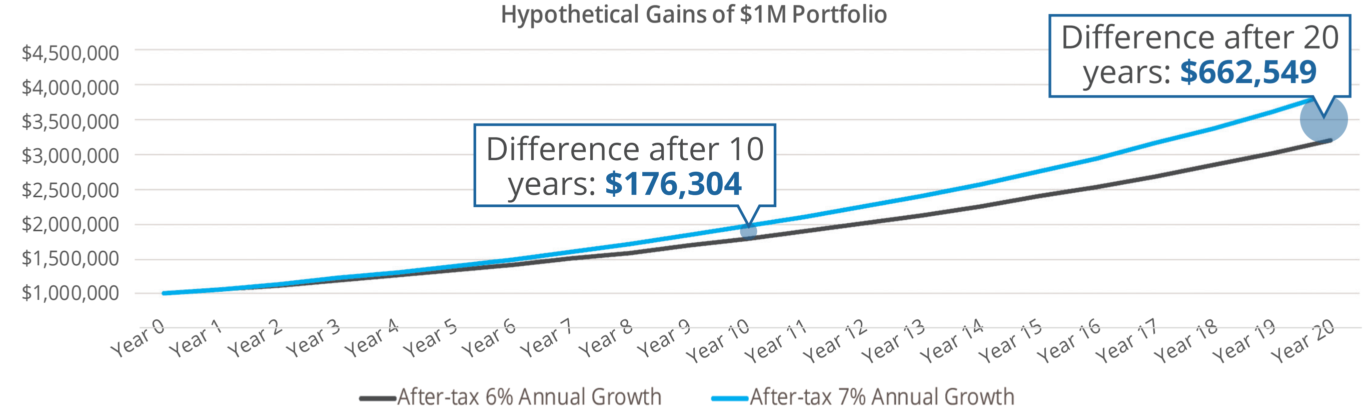
Customized tax solutions

Ability to utilize individually owned securities, state preferred municipal bonds, single account overlay efficiencies, and more to optimize tax efficiency

At Brinker Capital, your dedicated portfolio management team works with you and your advisor to ensure your portfolio is aligned with your goals and objectives. As part of the process, we take a tailored approach to managing the impact of taxes on your portfolio.

49% of high net worth investors indicate that minimizing taxation is a top investment priority.[1]

1% DIFFERENCE IN RETURNS OVER 10 AND 20 YEARS ON $1,000,000 INVESTMENT[2]



[1]Source: *Does your wealth manager measure up? Perspectives from CFA Institute research on high-net-worth investors*, CFA Institute, 2018.
[2]Source: Brinker Capital. Chart represents $1,000,000 investment over 20 year period at 6% and 7% after tax returns. After tax returns are not reflective of a tax rage but used to illustrate the hypothetical results of a 1% difference that efficient tax management may have on a portfolio. Returns are hypothetical in nature and are intended for illustrative purposes only.

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