

Enhanced risk management with Brinker Capital Wealth Advisory

Actively monitoring the risks impacting investor portfolios

Brinker Capital Wealth Advisory's enhanced risk management platform leverages our time-tested investment philosophy with advanced portfolio analytics, individualized risk-focused metrics, and portfolio customization to apply a holistic risk-aware approach to wealth management.

We monitor thousands of risk factors daily and stress-test portfolios to experience historical and hypothetical market shocks, so investors can focus on their goals and achieve better outcomes.

Wealth Advisory with our enhanced risk management provides:



Analytics

The ability to quickly analyze prospect account holdings and provide a proposal with in-depth analytics and recommendations



Stress testing

Stress testing portfolios for historical and hypothetical market shocks



Risk and exposure alerts

A streamlined process to analyze real-time portfolio risks and exposures across asset classes, sectors, and geographies



Book of business analysis

The ability to instantly analyze your book of business managed by Brinker Capital



Customization

A customized investor experience focused on outcomes



Progress tracking

A comprehensive view of an investor's assets to track progress toward goals

When using our enhanced risk management platform powered by Aladdin Wealth not only will you offer differentiated value to your current clients, you can gain new ones.

With the comprehensive portfolio observation reports from Brinker Capital Wealth Advisory you can better guide client futures.

BRINKER CAPITAL INVESTMENTS

Assessing investor portfolios with BlackRock's Aladdin® Wealth

Enhanced risk management from Brinker Capital Wealth Advisory

Brinker Capital Wealth Advisory builds customized portfolios for high net worth and institutional investors. Leveraging BlackRock's Aladdin Wealth technology and Brinker Capital's time-tested investment philosophy, our Wealth Advisory team applies a holistic risk-aware approach to portfolio management. The Aladdin Wealth technology features analytics tailored to the individualized portfolios and monitors thousands of risk factors each day, which empowers advisors to further help investors focus on their goals and achieve better outcomes.

Wealth Advisory with our enhanced risk management provides:

- Analytics:** The ability to quickly analyze prospect account holdings and provide a proposal with in-depth analysis and recommendations.
- Stress testing:** Stress testing portfolios for historical and hypothetical market shocks.
- Risk and exposure alerts:** A streamlined process to analyze portfolio risks and exposure across asset classes, sectors, and geographies.
- Book of business analysis:** The ability to instantly analyze your book of business managed by Brinker Capital.
- Customization:** A customized investor experience focused on outcomes.
- Progress tracking:** A comprehensive view of an investor's assets to track progress toward goals.

Contact Brinker Capital Wealth Advisory to start the conversation today

BRINKER CAPITAL INVESTMENTS

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Asset Class

Portfolio	Portfolio (%)	Benchmark (%)	Difference (%)
International Equity	15.38	18.00	-2.62
Fixed Income	27.05	40.00	-12.95
Domestic Equity	42.40	42.00	0.40
Absolute Return	6.38	0.00	6.38
Global Credit	5.71	0.00	5.71
Real Assets	0.99	0.00	0.99
Cash	1.84	0.00	1.84

Top Holdings

Sec ID	Description	Asset Class	Weight (%)
IWI	Shares Core S&P 500 ETF	Domestic Equity	10.89
RSIX	RiverPark Strategic Income Fund Institutional Class	Global Credit	.71
QSLXA	QR Style Premia Alternative LV Fund Class I	Absolute Return	.77
WMCCX	William Blair Macro Allocation Fund Class I	Absolute Return	.80
WPI	Shares Russel Mid_Cap Growth ETF	Domestic Equity	.73

Risk

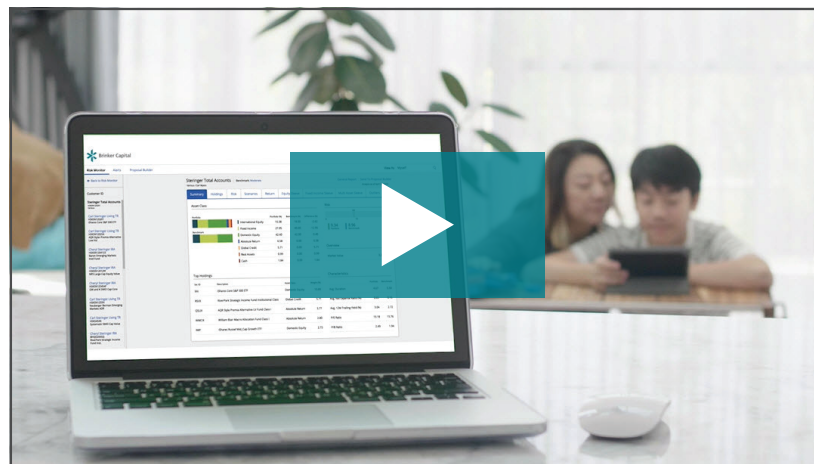
9.34 Portfolio | 8.96 Benchmark

Characteristics

	Portfolio	Benchmark
Avg. Duration	4.67	.50
Avg. Net Expense Ratio (N/E)	0.65	.16
Avg. 12M Trailing Yield (N/E)	3.04	.72
P/E Ratio	19.18	15.76
P/B Ratio	2.49	1.94

Market Value: 3,235,203

View our informational video and share with your clients



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