

Impact Investing

C O N F E R E N C E

Aligning Your Client's Vision – How to Effect Missions with Investments



John E. Coyne, III, Vice Chairman, Brinker Capital



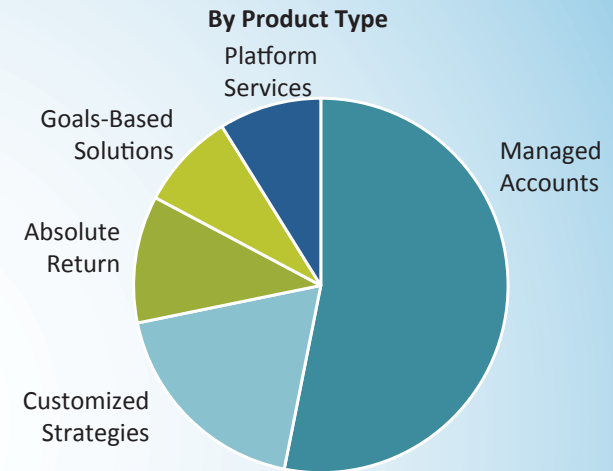
Mr. Coyne brings 30 years of industry experience to lead Brinker Capital's initiative to broaden distribution into new marketplaces, a key part of the firm's strategic plan. He is the firm's principal spokesperson with the news media and investment advisors. Prior to joining Brinker Capital, John held investment advisory and national sales positions at Butcher & Singer, Van Kampen, Morris Stone, Fidelity Leasing, and Mutual Benefit Capital Companies. John is a board member and Executive Committee member of the Money Management Institute and the recipient of its 2011 Pioneer Award; chairman emeritus and current board member for the Philadelphia Chapter of Teach for America; member of the Philadelphia chapter of the Financial Planning Association; and trustee of Mount St. Mary's University and chairman of its Endowment committee. John is a frequent speaker and host at industry conferences and has been quoted extensively in top financial and advisor media. In addition to appearances on Fox Business News and Fox Business's "Cavuto on Business", John's thoughts have appeared in *The Wall Street Journal*, *Newsweek*, *InvestmentNews*, *Registered Rep*, *Fund Fire*, *Money Management Executive* and many others. John is a graduate of Mount St. Mary's University and attended Temple University Graduate School.



Brinker Capital At-a-Glance

- Since 1987, a leading independent financial services firm committed to delivering a quality investment experience through firm-wide integrity and focused organizational structure
- Combined portfolio management team has extensive experience delivering innovative solutions, quality service and value to our clients
- Depth and breadth in product offering designed to preserve purchasing power

Assets Under Management: \$17.5 Billion



As of 6/30/14. Source: Brinker Capital. Amount in US dollars. Percentage may not equal 100 due to rounding. AUM by product breakdown: Managed Accounts = Destinations and Personal Portfolios, Customized Strategies = non discretionary Core Asset Manager, Absolute Return = Crystal Strategies, Goals-Based Solutions = Personal Benchmark and Retirement Plan Strategies.



Brinker Capital and Alternatives

- Brinker embraced alternatives more than a decade ago
- Experienced Sales Team has sold alternatives for more than five years
- Every product and solution that we manage includes alternatives
- Alternative SMA's date back more than 5 years, are GIPS (Global Investment Performance Standards) compliant and have in excess of \$1.9 Billion in assets¹



- Launched three absolute return mutual funds 12/30/13

1. Source: Brinker Capital. As of 6/30/14.



Brinker Capital's Foundation: Six Asset Classes

