MARINER

OUR APPROACH

Delivering Big Firm Resources, Small Firm Attention

Being part of a larger organization means gaining the power to do more for your clients and your career. At Mariner, our values ensure it doesn't come at the expense of personal connection.

We've intentionally built a structure that combines the benefits of a large organization with the personalized support of a boutique firm. Here's five ways we deliver access to excellence for you and your clients:

1. Access Dedicated & Localized Support

- **Regional Leadership:** Our decentralized leadership model ensures you have direct access to decision-makers who understand your needs and your market.
- **Personalized Transition Teams:** A dedicated team works closely with you during your onboarding process to ensure your unique needs—and your clients' needs—are addressed. You also will have a specific team member assigned to you, much like a personal concierge, who will guide you in connecting with all our resources and teams.
- **Client-Centric Focus:** You retain control of client relationships, with resources designed to support and enhance—not replace—your role.

2. Collaborate in an Advisor-Focused Culture

- **Small-Group Networks:** Within Mariner, advisors form smaller teams and communities to collaborate, share strategies and connect on a personal level.
- **Tailored Growth Plans:** We don't believe in a one-size-fits-all approach. Your goals are unique, and we craft a plan that fits you.
- **Accessible Leadership:** From our executive team to your regional leaders, we pride ourselves on maintaining an open-door policy for support and guidance.

3. Retain Your Entrepreneurial Focus

- **Entrepreneurial Spirit:** You have the autonomy to run your practice while leveraging our vast resources. We understand every client is unique and our in-house teams of specialists—from tax to insurance to estate and trust planning—serve as resources to assist your clients.

- **Empowered Decision-Making:** Your voice matters. We actively seek feedback from advisors to help ensure our tools, resources and strategies align with what you need.

4. Enhance Your Impact on Clients

- **Infrastructure:** Our size allows us to invest heavily in technology, compliance, marketing and research—giving you more time to focus on clients.

- **Specialized Expertise:** With in-house teams for tax planning, estate strategies, and investment research, you can elevate your value to clients without feeling overwhelmed.

- **Buying Power:** Our goal is to provide you access to better tools, resources and opportunities that only a firm of our scale can provide.

5. Elevate Your Career

- **Continued Coaching:** We support your continued journey of growth and success through training, coaching and leadership programs brought to you by our practice management team, local and national leadership and our advisory and business unit leaders.

- **Enhanced Training & Development:** We offer experiences such as MarinerWeek—where you interact with peers and learn from our leaders about Mariner resources—and an Advisor Development Program that gives you step-by-step tools for every point in the client journey. Our Regional Managing Directors hold regular leadership meetings to bring you the latest updates and helpful information. Our annual National Advisor Meeting brings together advisors from around the country providing access to national speakers, impactful sessions and detailed breakouts to continue to equip you with what you need to deliver best in class to your clients.

- **Recognition of Success:** We celebrate individual advisor achievements and offer platforms to share your expertise with others across the firm.

For more information visit: **joinmariner.com**