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MARINER ADDS TO WEALTH MANAGEMENT STAFF

Additions come from Broker-Dealer Ranks



Katie Dunn Fitzgerald

Trey Barnes

Herb Sih

(Leawood, Kan.) – Mariner Holdings, LLC, is pleased to announce the addition of three experienced investment professionals to their staff. Katie Dunn Fitzgerald comes to the firm from UBS Financial Services, Inc., while Trey Barnes and Herb Sih join the firm from Wachovia Securities, formerly A.G. Edwards.

“We are very pleased that our growth trajectory is allowing us to continue to add financial professionals to our team,” commented Marty Bicknell, Mariner’s CEO. He added that “the exceptionally challenging economic environment we are in makes having the right personnel in place absolutely critical to our clients’ success.” Katie and Trey will take the helm as client relationship managers, while Herb will carry duties both at Mariner Wealth Advisors and Mariner Capital Ventures, part of the firm’s private equity division of Mariner Equity Management, LLC.

Katie Dunn Fitzgerald is an active member of the Kansas City Chamber of Commerce’s Centurions Leadership Group, is active with various programs in the United Way, and serves as a board member of St. Luke’s Crittenton Children’s Center. She held the title of account vice president at UBS.

Trey Barnes has 18 years of financial industry experience, specializing in retirement planning for small business owners, executives, and high net worth individuals. He holds the Certified Financial Planner™ designation, which is considered to be the pinnacle of financial planning standards. He has spent his career at A.G. Edwards, which became Wachovia Securities in 2007, where he held the title of senior vice president—investment officer.

Herb Sih also comes from the former A.G. Edwards office in the Kansas City suburb of Overland Park, Kansas. His 14 years of financial services experience includes five years at the Kansas City Merrill Lynch office. His extensive entrepreneurial and institutional-level experience will make him a valuable asset to the Mariner Equity Management team. Prior to his work in the field of finance, Herb was a United States Army helicopter pilot, assigned to a search and rescue/special operations unit.

Mariner Holdings is a Kansas City-based investment and wealth management firm. Mariner offers diverse financial expertise in the fields of wealth management; estate, tax, and benefit planning; insurance; charitable giving; private equity; and specialized services for executives and business owners. For more information on the firm, visit www.marinerwealthadvisors.com or www.marinerequity.com.

