

Seven questions to ask yourself about how your wealth is managed

At Mariner Wealth Advisors, we think deeply about the solutions we offer our clients. We believe finding the right solutions begins with asking the right questions. As you evaluate the current advice you are getting for your business, your investments, your taxes and/or your family's wealth, here are seven questions to consider:

1. How independent is your current investment advisor?
2. Is the relationship primarily transactional or advisory?
3. How proactive is your advisor in anticipating your needs as your life or business situation changes?
4. How often does your adviser contact you and how long does the conversation last?
5. How much experience do they have personally in areas that are most important to you?
6. What is the range and depth of professional experience at your adviser's firm, especially in areas such as alternative investments?
7. Do you feel comfortable sharing your entire financial picture or goals, or just the slice that reflects the adviser's primary area of expertise?

We think that when you look more closely at our people, our skill sets, our record, and our clear and comprehensive client-centered approach to your needs, you'll gain a very high level of confidence in what we do.