

Our Clients

At Mariner Wealth Management, we are adept at serving the unique needs of high net worth individuals and families, as well as business owners, corporate executives, and institutions.

Individuals

As a high net worth individual, you have specific needs that deserve an approach designed for your unique situation. At Mariner, we have created an approach to wealth management that addresses your requirements. From financial planning and investment advisory services to risk management and wealth transfer, we give you the confidence that allows you to pursue that which is most important to you.

Families

Your family's needs are complex. At Mariner, our family office services give you access to specific experience in navigating the many issues that high net worth families face. Mariner can serve as your family's Chief Financial Officer providing a complete suite of wealth management services, and then going beyond to provide lifestyle management or concierge services such as calendar management, administrative services and more.

Business Owners

For most business owners, personal wealth management is intertwined with your business affairs.

At Mariner, you can access seasoned professionals who understand the specific issues facing business owners like yourself. You can connect with expertise for everything from risk management to executive compensation planning to business and property management and more.

Corporate Executives

As a corporate executive, you have personal and business-related financial issues that must be coordinated. At Mariner, you have the experienced resources to address your unique requirements, from executive compensation planning to risk management to financial accounting for executives and more.

Institutions

Mariner has a proud history in serving institutional clients across a broad array of investment capabilities, including traditional equity and fixed-income solutions, alternative investment platforms and other customized strategies. We bring our team of dedicated, professional portfolio managers and wealth advisors to work with each of our clients so that we can meet our clients' evolving needs.

Mariner Wealth Advisors is an independent wealth management firm. Our mission is to help clients and their families achieve and maintain financial peace of mind – preserving the wealth clients have created and building a legacy for future generations of family and business leaders.



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