Mariner Wealth Advisors

Wealth Management

A clear and comprehensive wealth management plan charts the course to your financial destination. Through our state-of-the-art financial planning process, we account for all of your needs to create the map that will guide your journey.

Wealth Transfer

You may wish to leave a legacy to heirs, a favored organization, and more. We help you develop a transfer strategy that ensures your wishes are met while minimizing potential issues surrounding wealth transfer such as excessive taxation, family dissent, and other challenges. With the help of a team of trust attorneys, CPAs, and other estate planning specialists, we guide you through the common pitfalls to ensure your goals for the transfer of your wealth are realized.

Risk Management

Mitigating risk is an important part of your wealth management strategy. Our experts help you evaluate your tolerance for risk, ensuring your tolerance is aligned with the goals outlined in your wealth management plan. Of course, life changes and, as it does, so do your needs. For that reason, you can rely on us to provide regular reviews to make sure that your wealth management plan matches your evolving needs.

Philanthropy

Sharing your wealth to make a difference in the world can be powerfully rewarding. Through our work with high net worth families, we have a unique understanding of the factors surrounding charitable giving. You benefit from our formalized strategic philanthropy approach that helps define your charitable values and concerns. This lays the foundation for your charitable giving strategy. We then help you direct your giving with tools that provide the maximum benefit for you and your benefactor, ensuring a meaningful and lasting impact.

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.

Investment Advisory
Your wealth management plan benefits from our unique investment advisory offerings that continue to prove successful for Mariner clients. There are four aspects to this offering that define the Mariner difference:

- » We select only the best asset managers for you and your specific needs
- » We select only the best products for you and your specific needs
- » We believe non-traditional assets should be an important part of a portfolio
- » We invest our own money in the opportunities that we present to you

Executive Compensation
As a business owner or corporate executive, you face compensation challenges unique to your position. Mariner offers you extensive personal and professional experience in addressing these challenges whether you run a closely held family business or operate in a multi-national corporation. From strategic planning to defined benefits to succession planning, you can rely on Mariner to serve as your personal Chief Financial Officer.

Business Succession
Unique needs arise as you consider your exit strategy from your business. Mariner brings you proven expertise in navigating the many issues that surround business succession. From passing on the business to heirs to selling the company to new owners, you can tap into Mariner's experience. With thorough business succession planning, Mariner can help you ensure the continuation of the business, maximizing the return you receive for the sale, and more.

Family Office
High net worth families experience a unique set of challenges that can result in undue stress for you and yours. Mariner's family office services help mitigate the challenges by providing you with comprehensive affairs management for your financial as well as personal needs. By serving as your family's Chief Financial Officer, Mariner frees you from mundane tasks while giving you the peace of mind of knowing that your affairs are being handled with the utmost care.