FAMILY OFFICE SERVICES

Your Family, Your Values, Our Advice

A family office is a team of professionals that act as a primary, integrated source to help high-net-worth individuals and families achieve their goals and focus on what's important. Mariner Wealth Advisors provides the resources your family needs to help manage, secure and grow your wealth while leaving a strong legacy for generations to come. Assembling a team of tax, investment, trust and insurance professionals, your Mariner Wealth Advisors family office team works with you to coordinate virtually every aspect of your financial life.

FINANCIAL & WEALTH PLANNING

Creating a financial plan that reflects your family's goals and aspirations is the bedrock of what we do. Mariner Wealth Advisors can help facilitate communication among family members and outside advisors or attorneys to clearly define your aspirations and the steps needed to get where you want to go.

ASSET ORGANIZATION

With the ownership of a multitude of different assets comes a basic need for organization and ensuring the essentials are taken care of. Your family office team will assist in locating, registering, titling and insuring your assets, such as cars, houses or boats.

DOCUMENT RETENTION

The ability to share, review and save all of your important documentation in one place is made possible through MarinerGPS, our online vault. Prioritize and organize your most important paperwork all in one place at a click of a mouse.

CASHFLOW MANAGEMENT

Tracking your household expenses and sources of income are crucial to ensuring your family's financial well-being. Your family office team will work to determine where you stand from a cashflow perspective and offer guidance to suit your personal needs.

Our areas of focus include:

- Development of financial policies and procedures
- Budgeting
- Cash flow projections
- Banking and payroll
- Communication with technology vendors and outside service providers as necessary

CHARITABLE GIVING & PRIVATE FOUNDATIONS

Should philanthropy be a part of your family's goals and values, we will work with you to identify and efficiently support causes important to you. Utilizing expansive industry knowledge, we can facilitate the management of donor-advised funds or the establishment and continued oversight of your private foundation.

ESTATE PLANNING & MULTI-GENERATIONAL WEALTH PLANNING

If leaving a legacy for your family, community, or favorite charitable organization is important, we can help ensure your assets are transferred in accordance with your wishes. Tax efficiency is vital in this regard and our suite of integrated services work together to design a comprehensive estate plan that is custom tailored to your family's dynamics. Our experience in the areas of wealth transfer involving family limited partnerships or LLCs, charitable giving methods, and strategic gift giving and planning provides value in making sure your legacy lives on long after you are gone.

RISK MANAGEMENT

Risk comes in many different forms and it's often the things we don't expect that can pose the greatest risk to your family's well being and financial health. Our seasoned insurance professionals work with your family office team to determine what your specific needs may be. By partnering with outside providers, we can find the appropriate policy structure to safeguard your assets and continuously monitor those policies to mitigate risk.

INVESTMENTS

Your wealth advisor will actively manage your investments with frequent portfolio reviews to account for both your lifestyle needs and risk tolerance. Mindful that with increased investment complexity comes the need for heightened reporting, your advisor can walk you through your net worth summary, how your investments performed and how they compare to benchmarks and peer group performance.

TAX PLANNING & PREPARATION

Mariner Wealth Advisor's team of in-house CPAs work with your family office team to provide strategic tax advice as well as prepare individual, gift, trust and estate tax returns. We will also proactively look for opportunities to mitigate tax impacts through tax credit purchases and a variety of charitable approaches.

FAMILY INVESTMENT PLANNING & EDUCATION

Mariner Wealth Advisors can coordinate financial planning and educational activities for children and grandchildren to help prepare the next generation to better manage inherited wealth. These custom-built meetings are tailored specifically to the areas your family members may need to address most, and results are tracked over time, ensuring future generations have the education needed to prepare them.

SECOND OPINION SUPPORT

If you already have an advisory relationship in place, we welcome the opportunity to partner alongside them to ensure all parties are working together to best meet the needs of your family.

Mariner Wealth Advisors' family office services feature a depth of knowledge and flexibility to adapt it's suite of services on an individual basis. We serve as an advocate and advisor for our family office clients so they can concentrate on meeting their goals, running their business, or pursuing their life's passions. Regardless of our level of engagement, Mariner Wealth Advisors puts clients first, providing service to our family office clients through value, integrity and transparency.

For more information visit us at www.marinerwealthadvisors.com