Because income, diversification and stability are some of the primary reasons investors include a fixed income allocation in their portfolio, we carefully balance risk and after-tax return in every investment decision.

Mariner WEALTH ADVISORS

Building Your Portfolio

Because income, diversification and stability are some of the primary reasons investors include a fixed income allocation in their portfolio, we carefully balance risk and after-tax return in every investment decision. Our approach is slow and steady, research-driven and disciplined.

We do not structure portfolios relative to a market index. Instead, our team takes a long-term approach, employing thorough credit research and opportunistic trading as the basis of its investment process.

"We do not structure portfolios relative to a market index."

Investment Process

- Macroeconomic and Municipal Market Environment
- Duration, Yield Curve and Structure Strategy
- Credit Research and Relative Value Analysis
- Security Selection and Creation of Client Portfolio

Municipal Fixed Income Strategy

Municipal fixed income strategies are designed to be the foundation of a client's long-term fixed income asset allocation by providing principal preservation, stable tax-free income and diversification.

We take a long-term approach, employing thorough credit research, and construct portfolios using short- to intermediate-maturity essential purpose bonds, diversified by issuer and maturity. Our municipal portfolios are customizable, aiming for the most attractive tax-advantaged yield for each client within a conservative context.

Taxable Fixed Income Strategies

Taxable fixed income strategies are also designed to be the foundation of a client's long-term fixed income asset allocation, by providing principal preservation, stable income and diversification.

We take a long-term approach, using thorough credit research, that includes diversification by issuer and maturity. Portfolios are constructed using short- to intermediate-maturity Treasuries, agencies, investment grade corporate and essential purpose taxable municipal bonds, as well as certificates of deposits, depending on market conditions.

Why Mariner Wealth Advisors?

Mariner Wealth Advisors serves clients with a goal of providing exceptional service. Our client-centric focus includes the recognition that no two clients are alike, so we offer the ability to customize portfolios to meet individual goals and needs. Putting our clients first in everything we do is how we succeed together.

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Municipal bonds are debt securities issued by states, cities, counties and other governmental entities to fund day-to-day obligations and to finance capital projects such as building schools, highways or sewer systems. Corporate bonds are debt securities issued by corporations. Companies which issue higher yield bonds typically have an increased risk of defaulting on repayments.

Investing in any bond market is subject to risks, including market, interest rate, issuer, credit, inflation risk, and liquidity risk. The value of most bonds and bond strategies are impacted by changes in interest rates. Bonds and bond strategies with longer durations tend to be more sensitive and volatile than those with shorter durations; bond prices generally fall as interest rates rise, and the current low interest rate environment increases this risk. Current reductions in bond counterparty capacity may contribute to decreased market liquidity and increased price volatility. Bond investments may be worth more or less than the original cost if sold prior to maturity. Amortization/accretion of cost basis for a bond held to maturity will not result in a loss to the client based on the yield locked-in at the time of purchase. Income from municipal bonds may be subject to state and local taxes and at times the alternative minimum tax. A strategy concentrating in a single or limited number of states is subject to greater risk of adverse economic conditions and regulatory changes. Diversification does not ensure against loss.

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