



INVESTMENT MANAGEMENT



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At Mariner Wealth Advisors, we don’t just provide clients with services, we serve as their partner. We take the time to get to know clients beyond their finances. We want to know their dreams and aspirations, their challenges, their plans and their priorities. Our investment approach is based upon building a framework that reflects their specific objectives.

Advisors work with clients to address a wide range of investment goals, which may include:

- Growth Expectations
- Income Requirements
- Tax Considerations
- Risk Tolerance
- Investment Time Horizon
- Liquidity Requirements
- Special Needs and Philanthropic Activities

Building Your Portfolio

Mariner Wealth Advisors strives to build wealth for the long-term, growing and guarding assets through strategic asset allocation and disciplined due diligence.

We take a proactive approach by diversifying client portfolios among multiple asset classes, which may include cash, fixed income, equities, real assets and alternative investments. We may utilize both active and passive strategies and, within each asset class, we consider different styles and strategies available.

Portfolio Investment and Management Process

WHEN BUILDING INVESTMENT PORTFOLIOS, OUR TEAM:

- Assesses the client's profile for risk tolerance, investment objectives, time horizon, income requirements and tax bracket.
- Develops asset allocation strategies that take into account the client's goals and objectives, as well as the client's willingness and ability to take risk.
- Selects investments we feel are appropriate for the specific client's portfolio, which can include mutual funds, individual stocks, individual bonds and ETFs.



WHEN MANAGING CLIENT PORTFOLIOS, OUR TEAM STRIVES TO:

- Stay disciplined by testing possible changes against their potential impact, with a focus on the likelihood of realized value after taking into account associated costs and risks, not to confuse activity with progress.
- Rebalance by monitoring tax loss harvesting opportunities when available and monitoring for asset allocation adjustments that need to be made to keep a portfolio on track to meet risk tolerance and investment objectives.
- Monitor investment managers through qualitative and quantitative analysis as applicable.

Why Mariner Wealth Advisors?

When working with clients to build their portfolios, we consider their unique objectives, risk tolerances and constraints. After gaining an understanding of what is important to clients and where they fall on the risk spectrum, we implement an investment mix to help them achieve their goals. A target range is defined for each asset class, and periodically, a client's advisory team will review the portfolio to help ensure it remains in line with its stated risk tolerance and objectives.



FOR MORE INFORMATION

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