



*Michael
Horne*

Advisor Grows Footprint in the Northeast

Greenfield Office Snapshot



Wealth Advisor: Michael Horne, CFP®:
Managing Director, Senior Wealth Advisor

Location: Boston, Massachusetts

First Boston–Area Office¹ Opened: 2021

**Wealth Advisors Across
Two Boston–Area Offices:** 6

**Growth in AUA Since Opening
First Boston–Area Office¹:** 30%

Greenfielded Boston Office Grows Footprint in Northeast

Michael Horne previously worked for a large RIA that in his opinion underwent a culture shift following a merger. That's when he began an extensive search for his ultimate career "home," speaking with some of the top firms in the industry. Impressed by Mariner Wealth Advisors' CEO and President Marty Bicknell's vision, he was asked to greenfield the firm's first Boston location, said yes, and never looked back.

Attributes Horne Looked for in a New Firm

- **A company culture** that supported his desire to prioritize clients over shareholders
- **An investment lineup** that would meet the diverse needs of his clients
- **Technology solutions** that could help him provide a unique client experience

Why Horne Chose Mariner Wealth Advisors

- **A genuine "client first" philosophy** that permeates and defines the firm
- **Choice of industry-leading investment offerings** such as equities, private investments and individual bond ladders
- **Access to cutting-edge technology** and other back-office logistical support, including operations, marketing and compliance
- **Ability to advance his career.** After spending a year working in the Boston-area office as a senior wealth advisor, Horne was promoted to managing director. While he still serves his clients, he is leading the firm's organic growth efforts and strategy, including referral partner programs and corporate offerings.

"I really took my time to do my due diligence, to find a place where I could grow and stay," Horne said. ***"I was impressed by the passion of Mariner Wealth Advisors' leaders."***



We Give Advisors Time Back to Focus on Clients

Support from our in-house teams gives wealth advisors the freedom to focus on their clients and business growth. Because your business is built on cultivating long-term client relationships, when conversations and one-on-one meetings suffer for lack of time in your day, the bottom line can, too. Along with many other wealth advisors, Horne has discovered that being part of the Mariner Wealth Advisors family frees up his time so he can make clients a top priority while leaving the logistical details to the firm's support team.

"The company's client-first philosophy made a big impression on me," Horne said. ***"As a national advisory firm, I believe we are the best at offering clients exceptional service."***

We Help Make the Transition Seamless

Mariner Wealth Advisors has put in place a time-tested onboarding process that helps create a seamless service experience for clients and advisors, which in turn supports retention.

“My transition to Mariner Wealth Advisors was quicker than I’d expected,” Horne said. “I was prepared for a rough year but instead was amazed by the support and fairly turnkey process.”

Our Transition Process

- Experienced practice management and operations specialists walk your team step by step through the transition.
- Dedicated service teams at several major custodians support you and your clients through the onboarding process.
- 100% of Mariner Wealth Advisors’ tools, resources and back-office support, such as compliance, marketing and IT, are made available on day one.
- On your first day as part of the Mariner Wealth Advisors family, human resources will take over your benefits and compensation administration, payroll/time reporting, compliance/risk mitigation, recruiting and associate onboarding, performance management, training and development, records retention and terminations/offboarding.
- Also on your first day, operations will begin handling tasks such as trading, billing, reporting and more.



Ready to Take the Next Step?

At Mariner Wealth Advisors, we believe the key to successful wealth management is building strong, long-term relationships—which is one of the reasons we provide specialized support from experienced teams to enable these connections to grow and thrive.

If you’re looking for an opportunity to build your business strategically, we offer different paths designed to fit your growth goals and values. Our client-first mission drives everything we do. If that’s your priority, too, consider joining the Mariner Wealth Advisors family.

For more information visit: joinmwa.com.

¹ As of 6/30/22. Assets and AUA totals include a combination of assets under management and assets under advisement is not meant to represent regulatory assets under management. Please see Form ADV filings for specific information on regulatory assets under management.

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