



## Lift-Out Case Study

# Mariner Wealth Advisors Lift-Out Offers St. Louis Group Expanded Client Services

## Lift-Out Snapshot



**Wealth Advisor:** Patrick Howley III, CFP®  
Director and Senior Wealth Advisor

**Former Practice:** Large national RIA

**Location:** Brentwood, Missouri

**Number of Associates:** 23

**Current AUA:** More than  
\$1.4 billion<sup>1</sup>

**Joined Mariner Wealth  
Advisors:** 2015

### Lift-Out Expands Client Services for Director, Senior Wealth Advisor

Patrick Howley and some of the advisors from the former RIA he worked for sought a lift-out opportunity with Mariner Wealth Advisors so they could provide more comprehensive services for their clients. As a result of the lift-out, he and his team opened a new St. Louis office location for the firm, helping us expand our Midwest presence.

### Challenges the Team Faced Prior to Lift-Out

- Lack of infrastructure support for advisors and clients
- Clients didn't meet certain requirements of former firm
- Inability to provide comprehensive wealth planning to clients

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***“At my previous firm, it was difficult to help clients who were just starting out because the firm had minimum asset requirements,”*** Howley said.

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### Why the Team Chose Mariner Wealth Advisors

- Clients were a better fit with our firm vs. their previous firm
- Collaboration with in-house advisory solution teams, including tax and trust
- Ability to create comprehensive wealth plans for clients
- Dedicated technology and infrastructure support
- Career opportunities for the team

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***“One of the biggest benefits has been Mariner Wealth Advisors’ technology platform,”*** Howley said. ***“Mariner Wealth Advisors dedicates resources to technology to support our advisors and clients, which makes a huge impact.”***

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## We'll Give You Time Back to Focus on Clients

Mariner Wealth Advisors will provide you with support from in-house teams, which will give you time to focus on your clients and business growth. Individual relationships are typically where the plans are created—when those conversations and one-on-one meetings suffer, the bottom line can, too.

Howley and the other advisors have found that being part of the Mariner Wealth Advisors family gives them freedom to focus on the most important connections while leaving the logistical details to the firm's support team.

When wealth advisors join Mariner Wealth Advisors, they can rely on support from experienced professionals who are part of a top-ranked\* national advisory firm with offices across the country.

## We'll Help Make the Transition Seamless

The acid test of a successful transition—and one of the biggest concerns of a team of wealth advisors considering joining Mariner Wealth Advisors—is client retention. A clear plan and confident implementation are essential stress-reducers to help clients make the move smoothly.

Another big concern is the transition timeline. Mariner Wealth Advisors will create and implement a plan designed to meet your team's needs and make it easy for you and your clients to make the switch.

## Ready to Take the Next Step?

At Mariner Wealth Advisors, we believe the key to successful wealth management is relationships, which is one of the reasons why we provide the support from experienced teams to allow these connections to grow.

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, so if that's your priority, too, consider joining the Mariner Wealth Advisors family.



**For more information visit: [joinmwa.com](https://joinmwa.com).**

<sup>1</sup>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. AUA represents a total for Brentwood, Mo. Please see Form ADV filings for specific information on regulatory assets under management.

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