



Acquisition Case Study

In-House Support Allows Advisors to Take Their Practice to the Next Level

Office Snapshot



Managing Director: Andrew McDowell, CFP®, CDFIA®, J.D.

Director: Patrick McDowell, CFP®, AIF®

Former Practice: Arbor Wealth Management

Current Location: Miramar Beach, Florida

Founded: 2010

Number of Associates: 8

AUA: More than \$461 million¹

Joined Mariner Wealth Advisors: 2022

Advisors Gain “Unlimited Tool Kit” to Better Serve Clients

Margaret McDowell and her sons, Andrew and Patrick, wanted to grow their family-owned practice and client services, so they searched for a partner with extensive in-house resources and team support. They focused their search on top-30, growth-oriented firms with a client-first approach. After just two calls, they decided to join Mariner Wealth Advisors. Margaret retired shortly after, and Andrew and Patrick assumed leadership of the practice.

Challenges Faced Prior to Acquisition

- Excessive time spent on back-office functions, resulting in less time both for existing clients and building the business
- Lack of access to high-level resources and support needed to grow the firm’s wealth
- Insufficient investment resources and solutions to allow for a more customized client experience

“I used to manage client assets myself,” Patrick said. “Now, rather than being the only specialist, I have access to a wide variety of investment specialists and solutions. It’s been a game changer for me and our clients.”



Why Mariner Wealth Advisors

- Support from back-office teams, including compliance, marketing, IT and operations
- Collaboration with specialized in-house advisory solutions teams, from tax planning to trust services and estate planning
- A broader menu of investment solutions, including fixed income and options
- Opportunities for growth at a business and professional level



“None of the firms we talked to came close to Mariner Wealth Advisors,” Andrew said. “It’s not cookie cutter—it’s the perfect combination of big firm capabilities and small firm touch. Our partnership has turned on the growth machine for us.”

More Time With Clients

Support from our in-house advisory solutions and back-office teams allows wealth advisors to spend more time growing their practice and less time running it. We find that when advisors don’t have the time they need for conversations and one-on-one meetings with clients, their bottom line can also be affected.

Andrew and Patrick McDowell, as well as many other wealth advisors, have discovered that being part of Mariner Wealth Advisors frees up time so they can make clients a top priority while leaving the logistical details to the firm’s support teams. After joining our firm, many advisors embrace the opportunity to grow their client base.

“Managing back-office operations like technology, compliance and marketing is time consuming,” Patrick said. ***“Now that Mariner Wealth Advisors has taken that off our plate, we can focus on what we do best—serving clients.”***

Professional Growth Opportunities

Advisors appreciate the professional growth opportunities that come with being part of Mariner Wealth Advisors, a top-ranked firm with offices across the country and a steady growth strategy.

It’s not unusual for career-minded advisors to be tapped to provide directional support to other local Mariner Wealth Advisor offices or to open a new regional office. We give advisors resources and support to help them advance professionally.

“For the younger advisors in our small, family-owned firm, it could be difficult to see an independent career path,”

Andrew said. ***“With Mariner Wealth Advisors, they now have an opportunity for upward career mobility not connected to when my brother or I decide to retire.”***



Ready to Learn More?

If you’re looking for an opportunity to build your practice strategically, we offer different paths designed to fit your professional growth goals. Our client-first mission is at the center of everything we do. If that’s your priority, too, consider joining Mariner Wealth Advisors.

For more information on our personalized approach to wealth management and opportunities to join our firm, visit: joinmwa.com.

For more information visit: joinmwa.com.

¹As of 9/30/22. 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.

Mariner Wealth Advisors (“MWA”) does not provide all services mentioned. Some services are provided by affiliates and are subject to additional fees. Previous results or outcomes experienced by advisors/clients are unique to those situations and there is no guarantee of similar results or outcomes.

Mariner Wealth Advisors (“MWA”) is an SEC registered investment adviser with its principal place of business in the State of Kansas. Registration of an investment adviser does not imply a certain level of skill or training. MWA is in compliance with the current notice filing requirements imposed upon registered investment advisers by those states in which MWA maintains clients. MWA may only transact business in those states in which it is notice filed or qualifies for an exemption or exclusion from notice filing requirements. Any subsequent, direct communication by MWA with a prospective client shall be conducted by a representative that is either registered or qualifies for an exemption or exclusion from registration in the state where the prospective client resides. For additional information about MWA, including fees and services, please contact MWA or refer to the Investment Adviser Public Disclosure website (www.adviserinfo.sec.gov). Please read the disclosure statement carefully before you invest or send money.