



*Rachel
Vivian*

**Advisor Gains
Resources to Better
Serve Clients**

Office Snapshot



Senior Wealth Advisor: Rachel Vivian, CFP®

Former Practice: Large national RIA

Primary Location: El Segundo, California

Number of Associates: 6

AUA: More than \$404 million¹

Joined Mariner Wealth Advisors: 2022

Advisor Gains the Support Needed to Advance

Rachel Vivian was searching for a firm that would allow her to provide more customized investment solutions for her clients as well as grow her practice. Also important was access to referral networks and being part of a firm that supports women in leadership roles. Vivian joined Mariner Wealth Advisors knowing she would be backed by the in-house teams and resources she needs to succeed.

Attributes Vivian Looked for in a New Firm

- Investments that would be well suited to a rising interest rate environment
- Access to the tools, resources and investment options to best serve her clients
- A clear path for professional advancement and growth for her practice

“At Mariner Wealth Advisors, I can provide clients with solutions that are right for them.” Vivian said.



Why Mariner Wealth Advisors

- An open architecture platform that allows for model portfolios as well as more customized investment solutions, including individual bonds and advanced option strategies
- Collaboration with specialized in-house advisory solutions teams, from investment management to tax and estate planning services
- Opportunities for growth at a business and professional level

“As I’ve become familiar with our investment strategies, I’ve started moving some of my clients into more sophisticated solutions,” Vivian said.

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.

Vivian has discovered that being part of Mariner Wealth Advisors frees up time so she can make her clients a top priority while leaving the logistical details to the firm’s support teams. Like other advisors, after joining our firm, she has embraced the opportunity to grow her client base

Professional Growth Opportunities

Vivian appreciates the professional growth opportunities that come with being part of Mariner Wealth Advisors, a national 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.

“I’m a planner at heart, so I need to know I’m going to have support down the road. My goal is to double my AUA in two years. I knew I’d have the opportunity to do that here,” Vivian said.

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.



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*Total AUA for the El Segundo, Woodland Hills and Corte Madera, California, offices as 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.

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