



## Case Study

# In-House Support Helps Director Build Practice and Leadership Skills

## Office Snapshot

**Director & Senior Wealth Advisor:**

Joshua Goldman, Ph.D., CFA

**Former Practice:** Taylor Wealth Management**Current Location:** Cambridge, Massachusetts**Founded:** 2014**Number of Associates:** 5**AUA:** More than \$210 million<sup>1</sup>**Joined Mariner Wealth Advisors:** 2022

### Managing Director Gains Resources to Serve Clients “More Deeply”

Josh Goldman and his team joined Mariner Wealth Advisors through an acquisition. They were drawn to our firm’s client-first mission and their ability to leverage in-house advisory services and back-office teams. For Goldman personally, it is an opportunity to hone his advisor and leadership skills.

#### Challenges Faced Prior to Acquisition

- **Lack of access to high-level resources** and support needed to grow the firm’s wealth
- **Former practice lacked the time and resources** to provide a more in-depth, personalized approach to client service
- **Insufficient capacity for further expansion** into the health care, life sciences and small-business owner niches

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***“I now have more time to focus on clients and thoughtfully grow our team and the number of clients we serve,”*** Goldman said. ***“Equally important, I have access to in-house professionals to further develop my skill sets as an advisor and leader.”***

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#### 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 wealth solutions**, including investments and tax and estate planning, that are a better fit for clients
- **Opportunities for growth**—both at a business and professional level

#### More Time With Clients

Support from our in-house advisory solutions and back-office teams gives wealth advisors more time to focus on their clients. 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.

Goldman and 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.

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***“As we gain efficiencies, my team can further develop and focus on tasks that add value to clients,”*** Goldman said.

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## Professional Growth Opportunities

Advisors appreciate 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.

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***“Mariner Wealth Advisors has spent over a decade building the infrastructure and recruiting the talent to support the advisor,”***

***Goldman said. “Although the firm allows each office to retain what makes them unique, from a career trajectory perspective, Mariner Wealth Advisors provides us with a platform to allow for growth.”***

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## 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](https://www.joinmwa.com).**

<sup>1</sup>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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