



# Are Challenges Limiting Your Potential?

## 3 Solutions to Common Hurdles Advisors Face



Remember when you began your career in financial services? You likely wanted to be a wealth advisor so you could help people. But despite your best efforts, you may find that time-consuming daily operations have been preventing you from spending enough time with clients. At Mariner Wealth Advisors, we give you the support you need to gain efficiencies so you can grow your business and build meaningful client relationships.

### Common Obstacles Advisors Face

Advisors tell us that one challenge is not being able to offer specialized products and services for the type of clients they want to attract. What's more, they don't see a clear path ahead for career advancement. They're also frustrated by having to spend time on routine tasks that limit time needed for creating growth strategies and solving client concerns.

Sound familiar to you? Do you feel like you're working harder than ever but not getting ahead?

Learn about the 3 most common challenges advisors typically face and the solutions Mariner Wealth Advisors offers to help overcome them.

### Challenge #1: Lack of resources and tools to enhance the client experience

Maybe you're losing clients because you don't have access to specialized wealth planning support or customized investment solutions for clients who have complex needs. Or perhaps you have an outdated tech stack that no longer meets your needs. You could outsource some advisory tasks and partner with outside vendors, but managing those relationships can be demanding and time consuming.

When you join Mariner Wealth Advisors, you can tap into robust resources and tools to help enhance client outcomes. For example, you can leverage the knowledge and experience of our in-house advisory solutions teams, including investment management, tax planning and preparation, estate planning and trust services. We also offer a variety of investments and advanced financial and tax planning software. And if technology is a headache, our skilled IT team can help you optimize your operational efficiency and protect client data.

*"As an advisor, I was driving a reliable family car before. Now I feel like I'm driving a Ferrari. There's so much power behind me."*

*— Amy Secor, senior wealth advisor*



### Challenge #2: Lack of opportunities for professional growth

Do you feel stymied or not supported in your desire to get ahead at your current firm? Do you have access to experienced wealth advisors who can serve as coaches or mentors? We often hear advisors say they don't have the benefit of an outside perspective or the right network of peers or experts with whom they can share practice planning ideas and goals.

At Mariner Wealth Advisors, we are fully invested in and committed to helping you achieve business and professional success. Here, you'll find a collaborative culture that gives you the opportunity to work with experienced wealth advisors and practice management consultants to enhance your knowledge and further your professional development. We support your continuing education and professional designation goals outside the office as well.

provided by our in-house advisory solutions and back-office teams allows our advisors to spend more time on growth goals, including retaining and acquiring new clients. Your ability to nurture long-term client relationships by offering more solutions, tools and a higher level of proactive, personal attention may help enhance your bottom line. Plus, we offer our advisors access to valuable referral partnerships to assist them in reaching their growth goals and objectives.

*“Serving my clients well while growing into a leadership role is important to me. Joining an established firm where I feel supported and valued gives me the opportunity to achieve my long-term entrepreneurial goals.”*



*— Joe Azzopardi, senior wealth advisor*

*“Having the time for value-based discussions is where I can differentiate myself. Conversations and goal setting leads to outcomes that tend to be measurably better for my clients.”*



*— Jennifer Anker, senior wealth advisor*

### Challenge #3: Lack of time to grow your practice

Do you find yourself bogged down with the day-to-day tasks of running a practice? You're not alone. Advisors tell us that by focusing on responsibilities that aren't boosting their bottom line, they're unable to leverage their time where it can add the most value: with clients and prospects.

From the beginning, Mariner Wealth Advisors has fostered a culture that emphasizes a client-first approach. This means our advisors are able to prioritize clients' needs and goals. The support

### Ready to Take the Next Step?

If you're thinking about making a move to an established firm that can provide the people, resources and tools to help position your practice for growth, you have a big, potentially career-defining, decision to make. We get it.

At Mariner Wealth Advisors, we give you access to specialized, in-house advisory solutions to help you build your practice thoughtfully and strategically. And for career-minded professionals, we offer different paths designed to align with your growth goals and values. These are just a few examples of why we have a **97.6% retention rate\*** among our wealth advisors.

Our client-first mission drives everything we do. If that's your priority, too, consider joining the Mariner Wealth Advisors family. To take the next step, contact **Amy Boyer, vice president, recruiting**, at [amy.boyer@marinerwealth.com](mailto:amy.boyer@marinerwealth.com) or 913-378-9974. Or simply click the button below.

**Schedule Time to Chat**



\*As of 6/30/23

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