

The Journey to Becoming a Top 5 RIA



“If it’s not about the client, we simply don’t do it.” This is the motto that Mariner Wealth Advisors lives by everyday — one which has led the firm from just an idea in 2006 to a top five RIA Firm by Barron’s from 2016 to 2021.

When Mariner Wealth Advisors was first founded in 2006, the firm consisted of 8 employees and 1 location, now they have 60 locations with over 1,000 team members.

Marty Bicknell, co-founder and current President and CEO, of Mariner Wealth Advisors attributes this growth in part to their philosophy of:

“Client First. Associate Second. Shareholder Last.”

They have built their firm around what clients need. The firm started by offering wealth planning resources and then added services from tax planning to insurance — all under one roof. This integrated approach to wealth management helps simplify their clients’ lives.

Marty recently joined us to kick off our Work Smarter webinar series, where we are hosting a group of RIA leaders to share their tips for scaling growth, exceeding client expectations, and creating efficiencies to ensure your firm runs as smoothly as possible.

Most RIAs spend the majority—55 percent—of their time on client-facing activities, with remaining time spent across administrative tasks, investment management, and training and professional development*.

Fueling their “Client First” approach, Mariner Wealth Advisors believes in having

their advisors spend 80 percent of their time on client-facing activities, which couldn't be possible without running an efficient firm.

Having the right tech stack in place to help with that efficiency is key. Mariner Wealth Advisors relies on Orion to help them scale the administration and automation of outside tasks to help free up their advisor's time and provide a consistent client experience.

With Orion's time-saving solutions for billing, reporting, compliance, and more — they were able to create a single and repeatable process for the entire firm to follow and provide their clients with a holistic view of their financial picture by combining investment account performance with financial planning.

Most importantly, Marty states, is to always keep the client at the center of everything you do.

Learn more about how you can efficiently streamline back-office tasks and enhance your client experience.

**The Cerulli Report, "U.S. RIA Marketplace 2020: Exploring Drivers of Change," Cerulli Associates, October 2020.*



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