MARINER WEALTH ADVISORS

EVENTS FOR THE SCHWAB ADVISOR NETWORK

Introduction to Wealth Planning

This presentation breaks down the components of a wealth plan into manageable, actionable steps. It helps clients begin to think about the process of planning for their financial future and illustrates to prospects the value of working with Mariner Wealth Advisors. During this presentation, we highlight several planning topics to consider, including:

- Risk Management
- Retirement
- Investments
- Education
- Long-term care
- Tax, trust and estate planning

Social Security Overview

Social Security is a federal insurance program that provides benefits to retired people and those who are unemployed or disabled. While simple in its goals, Social Security can be difficult to navigate, causing stress and confusion for many retirees. Here, we debunk some of the common myths and misconceptions surrounding Social Security, with a goal of providing clarity to help navigate the program's various benefits.

Estate and Retirement Planning Panel

Regardless whether retirement is right around the corner or years away, it is important to begin the planning process. This presentation discusses valuable considerations when going through retirement and estate planning.

Wealth Planning Considerations – Top 10 Things Lurking In Plans

This presentation helps navigate the difference between being effective with finances vs. being efficient. It was created based on the top 10 issues we see lurking in plans of prospects we meet with, including self-sabotage, poorly executable estate plan, lack of protecting, charitable inefficiency, lack of organization and communication, and much more. The presentation discusses why each of these examples are, indeed, a problem and walks you through action items to take to help make sure it doesn't happen to you.

A Glance At The TCJA of 2017

The Tax Cuts and Jobs Act of 2017 (TCJA) had far-reaching implications for individuals, families and businesses. In this presentation, we walk clients through how TCJA's changes may impact their financial future. It is intended to be a discussion of the areas that are most affected by TCJA, including:

- Investments
- Housing debt
- State and local taxes
- Medical expenses
- Child tax/529/kiddie tax
- Alimony/marriage payments
- Estate and gift tax

Succession Planning (Business Owners)

Transitioning ownership and/or leadership of a company may be the single most important business decision business leaders make. This event covers topics such as unexpected economic downturns, business heirs, estate planning, sentimental value of the business and buy-sell agreements.

Real Women. Real Conversations. Real Solutions

A series of events created specifically for women that focus on personal and professional topics. By sharing solutions to common challenges such as:

- How to foster and encourage talent in kids
- Tips for becoming involved with community and professional organizations
- Planning for retirement beyond finances
- Widows supporting widows

These events are a great way to strengthen and build relationships.

Protect Your Data to Protect Your Future

Chris Cook, senior vice president of information technology at Mariner Wealth Advisors, discusses cybersecurity challenges and practical tips to help clients protect their information, including:

- Preventing online fraud
- Digital footprint/online presence
- Vetting household help
- Residential safety and security
- Preventing elderly exploitation
- Travel security

Economic and Capital Market Updates

One of Mariner Wealth Advisors' senior investment professionals will provide insight into today's economic environment and capital markets, including the impact it could have for your clients.

Long-Term Care Decisions – Your Family's Most Difficult Conversation

In this interactive discussion, we address various long-term care options, provide strategies for how to begin this difficult conversation with your loved ones and highlight the most important issues to consider as you begin to plan. This event includes two versions – one for caregivers and one for care recipients.