

To provide for your family, it's important to consider all aspects of your financial health, including insurance planning. Adding life, disability and long-term care insurance when needed can help ensure your level of protection aligns with your goals for safeguarding your family and your assets today and beyond.

We understand you have specific asset accumulation, protection and transfer goals. Working with our Insurance team professionals, we focus on common-sense design, review and implementation of insurance solutions, personalized for your and your family's needs.

Our Experienced Insurance Team Creates Custom Solutions to Support:

- Analysis of major insurance companies
- Evaluating insurance products
- Insurance recommendations
- Income protection strategies
- Life insurance audits
- Long-term care expense mitigation
- Wealth transfer and estate plan modeling
- Estate tax elimination strategies
- Executive benefit programs
- Nonqualified retirement plans
- Enhanced charitable giving strategies

We Can Help Answer Important Insurance Planning Questions, Such As:

- What type and how much insurance is needed to accomplish your goals?
- Have you considered the income consequences if you are unable to work due to an accident or illness?



- Have you considered other methods of transferring your wealth to your family and charity that could lower your income tax liability today and any estate tax in the future?
- Are you aware of tax-advantaged insurance products?
- What can be done to preserve your wealth from income and estate taxation?

Our Insurance Solutions:

- We deliver highly specialized and custom financial advisory services that leverage the vast experience of a team of professionals.
- We remain focused on designing and managing plans that help maximize value and minimize risk for our clients' corporate and personal assets.
- We offer innovative solutions designed to add value to each family and/or company.
- We leverage industry technology to deliver custom, efficient solutions for our clients.

Disclosures

The views expressed are for commentary purposes only and do not take into account any individual personal, financial, or tax considerations. It is not intended to be personal legal or investment advice or a solicitation to buy or sell any security or engage in a particular investment strategy.

Certain MPS representatives are licensed insurance agents and are compensated for the sale of insurance-related products through an affiliated insurance agency.

Investment advisory services provided through Mariner Platform Solutions, LLC ("MPS"). MPS is an investment adviser registered with the SEC, head quartered in Overland Park, Kansas. Registration of an investment advisor does not imply a certain level of skill or training. MPS is in compliance with the current notice filing requirements imposed upon registered investment advisers by those states in which MPS transacts business and maintains clients. MPS is either notice filed or qualifies for an exemption or exclusion from notice filing requirements in those states. Any subsequent, direct communication by MPS with a prospective client shall be conducted by a representative that is either registered or qualifies for an exemption or exclusion from registration in the state where the prospective client resides. For additional information about MPS, including fees and services, please contact MPS or refer to the Investment Adviser Public Disclosure website (www.adviserinfo.sec.gov). Please read the disclosure statement carefully before you invest or send money.

Investment Adviser Representatives ("IARs") are independent contractors of MPS and generally maintain or affiliate with a separate business entity through which they market their services. The separate business entity is not owned, controlled by or affiliated with MPS and is not registered with the SEC. Please refer to the disclosure statement of MPS for additional information.