Mariner Wealth Advisors to Acquire Savant Investment Group, LLC

Firm to Add Approximately $740 Million in AUA on the Heels of Active Summer Growth

Overland Park, Kan. – November 18, 2021 – Mariner Wealth Advisors, a national wealth advisory firm, today announced that it will acquire Bay Area-based Savant Investment Group, LLC. The Emeryville, Calif. office will be the firm's seventh office in the state and third in the Bay Area. This is Mariner Wealth Advisors' ninth announced acquisition since the start of the year, and it has grown to 1,000 associates and 500 advisors. The terms of the deal were not disclosed.

"It's been an exciting year, and we're just getting started," said Marty Bicknell, CEO and president of Mariner Wealth Advisors. "Our longstanding team of expert advisors continues to astound me with the work they're producing, and I'm thrilled to continue adding to our team with an impressive firm like Savant."

Savant Investment Group, LLC has seen tremendous growth over its three decades in business, and is now serving over 240 clients with $739 million in Assets Under Advisement (AUA). In addition to financial planning and wealth management, the firm has developed a solutions-driven approach to providing tailored retirement plan services designed to evolve with the changing times. Their background in retirement planning for businesses will bring added expertise to Mariner Wealth Advisors' rapidly growing Retirement Plan Solutions team.

"This is an incredible opportunity for our firm to provide career development for our employees and to continue delivering a comprehensive financial planning experience to clients," said Scott Lummer, founder and CEO of Savant Investment Group, LLC. "I'm excited to draw on Mariner Wealth Advisors' broad array of services to bring even more value to our clients, from insurance and tax planning to estate and trust services."

Lummer will continue to run the Emeryville office with the guidance of regional managing director Alise Krause. The firm will assume the Mariner Wealth Advisors name at the close of the deal, and all eight associates will retain their current roles. Berkshire Global Advisors served as the exclusive financial advisor to Savant in this transaction.

To learn more visit marinerwealthadvisors.com.

About Mariner Wealth Advisors

At Mariner Wealth Advisors, we provide 360° advice designed to last. We focus on one thing—partnering with clients to create a financial strategy for today and beyond that's flexible enough to change along with them. The ultimate goal? Helping clients identify what is important so they can achieve their goals—we're committed to being here for everything life brings their way. We've built our firm around what our clients need. We began by offering wealth planning resources and then added services from tax planning to insurance – all under one roof. We believe this integrated approach to wealth management helps simplify our clients' lives. Founded in 2006 with $300 million in assets under advisement (AUA), Mariner Wealth Advisors and its affiliates now advise on over $50 billion in assets[1].

[1] Assets are calculated using assets under management and/or advisement of subsidiaries of Mariner Wealth Advisors, LLC and totals do not include all assets of acquisitions closed as of 9/30/21. Actual assets are subject to change as clients of acquired firms are onboarded to Mariner Wealth Advisors.