

Mariner Wealth Advisors Adds Tom O’Sullivan as Managing Director for Mariner Platform Solutions

New Managing Director Responsible for Onboarding New Advisors Across the East Coast

Overland Park, Kan. – {DATE}, 2021 – Mariner Wealth Advisors, a national wealth advisory firm, today announced that industry veteran Tom O’Sullivan has joined the company as managing director of corporate development. O’Sullivan will be a part of the Mariner Platform Solutions (MPS) team and responsible for building relationships with advisors on the platform and guiding them through the onboarding process.

“I’m thrilled to join Mariner Wealth Advisors and contribute to the efforts of the MPS team,” said O’Sullivan. “Throughout my career I’ve had an affinity for helping financial advisors reach their full potential, and I’m looking forward to taking this passion to the next level and continuing to help them provide exceptional client service with the Mariner team.”

Mariner Platform Solutions offers a suite of resources for independent firms and advisors, including investment portfolio design and implementation, marketing, technology, and compliance and operations support, which allows them to provide full service to their clients while maintaining their ownership and brand. By partnering with MPS, independent advisors have access to all the benefits of working with a nationally recognized wealth advisory firm.

Since launching last spring, O’Sullivan’s addition to the team signifies the growth ahead, particularly with Mariner Wealth Advisors’ recent acquisition of wealth advisory firm [AdvicePeriod](#). Through this acquisition the firm also acquired [AdvicePeriod for Advisors](#), a similar feature that brings advisors on under the AdvicePeriod brand while giving them the mobility to own and run their business under a trusted industry name. With the addition of this business, O’Sullivan is joining a rapidly growing team.

In addition to O’Sullivan, Mariner Platform Solutions’ team of relationship managers is composed of Jason McElwee and Matt Lovejoy. Together they will focus on building relationships with advisors and referral partners across the country, overseeing the East Coast, Midwest, and West Coast respectively. MPS has its own corporate development team that consists of seven people, and the entire team is overseen by Brian Leitner, head of Mariner Platform Solutions.

“We couldn’t be more excited to work with such a well-versed, incredible mind like Tom’s,” said Leitner. “His prior experiences make him the perfect fit to prioritize and build relationships with advisors, with the ultimate goal of continuing the growth and evolution of Mariner Platform Solutions.”

Prior to joining Mariner Wealth Advisors, O’Sullivan was a senior vice president at Congress Wealth Management. His previous experience also includes 27 years at Fidelity Investments,

where he most recently served as a senior relationship manager for Fidelity Institutional's RIA Strategic Accounts team.

To learn more about Mariner Platform Solutions, visit marinerplatform.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 has grown to nearly \$46 billion AUA as of June 30, 2021.