



MARINER

**Dynasty Investment Bank Served
as Exclusive Financial Advisor to
Jenkins Wealth on Its Sale to Mariner**

January 2025



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Served as Exclusive Financial Advisor to

MARINER

Announced the Acquisition of



January 2025

Transaction Details

- On January 13, 2025, Mariner announced it has entered into a definitive agreement to acquire Jenkins Wealth
- Majority sale will provide Jenkins Wealth additional resources to scale its operations while enhancing its client experience
- Provides Mariner with an enhanced geographic footprint in the Denver, CO market

Overview of Jenkins Wealth

- Founded in 2011, Jenkins Wealth is a Denver-based RIA with \$250 million in AUM
- Built on the foundation of a life's passion to provide individuals financial confidence through trust and transparency, Jenkins Wealth represents a premier independent RIA specializing in comprehensive financial planning and investment strategies
- With a deep commitment to client success, Jenkins Wealth is designed to support its clients through every stage of their life's journey

Overview of Mariner

- Founded in May 2006 by Marty Bicknell and his family office, Mariner is a Kansas-based RIA offering comprehensive wealth management solutions
- Backed by Leonard Green & Partners, Penfund, and most recently Neuberger Berman, Mariner has evolved into a nationally recognized brand with over 1,600 employees
- With an opportunistic growth strategy, Mariner has expanded to over 100 client-facing locations across the United States and Puerto Rico, overseeing more than \$258 billion in assets

Strategic Rationale

Opportunity for Mariner to partner with a scalable, sophisticated, independent wealth management firm dedicated to providing financial innovation, values and excellence to individuals through a comprehensive flexible service offering tailored to clients needs

Enables Jenkins Wealth to join a national, well-respected brand with the capital, extensive in-house capabilities, and a proven track record to foster a successful partnership and drive continued growth and innovation

Shared culture with a focus on client service that will allow the combined firm to enhance its service delivery to its clients



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