

2024

Impact Report



Who is Mariner?

Mariner exists to positively impact the lives of *many*.

Some say necessity is the mother of invention — that the driving force behind the boldest new ideas is a fundamental need to do better. That's where our story begins: with an innovative advisor named Marty Bicknell, who wanted to find a better way to help his clients succeed.

First, Marty formed a team of eight like-minded individuals who made a pact and a plan to start a first-of-its-kind financial services firm — to put clients first, to surround advisors with the tools they need to be successful, and to positively impact the lives of *many*.

So they went all in, using speed as a force to acquire top-tier talent for tax, trust, insurance, and more — all to help clients take on complex wealth challenges.

As Mariner grew, so did our ability to improve more lives. In 2009, we created the Mariner Foundation, funded by our associates and a dollar-for-dollar company match, resulting in millions of dollars in donations to the communities we call home.

Mariner has helped countless clients grow their wealth and achieve their goals — all while being focused on becoming the first financial services firm of its kind.

We've come a long way since Marty first imagined Mariner. But if you ask us, ***we're just getting started.***



Welcome!

At Mariner, our mission is to positively impact the lives of many. The same holds true for the work we do through the Mariner Foundation. We believe that to whom much is given much is expected. We are fortunate to have clients and associates who invest their time, talents and resources with us. We believe that we have a responsibility to provide access to those in our communities who may not have the same opportunities we have been afforded.

We are often asked how we decide to direct our giving, and that answer is simple. We put the power into the hands of our associates. Since 2009, we have given away over \$7.8 million into our communities. And it's all been through the passion of our associates to help guide where those funds are distributed. It helps us support a wide range of organizations as well as connects our associates to a purpose greater than all of us. With our combined resources, we are able to have a broader reach than we ever imagined when we began this initiative.

We are humbled that through the years we have supported over 1,100 organizations, across our communities, and just this year were able to give away over \$1.6 million.

At the end of our lives, the only question left to be asked will be: What kind of legacy did you leave? Our hope is through serving our clients, colleagues and communities, the answer will be that we made a positive impact on our communities, creating ripples through our world that are hard to even measure in totality.

Katrina Radenberg

Mariner Foundation Board President



The way our associates support the Mariner Foundation and our communities is one of the things I am most proud of. Taking care of others is ingrained in the hearts of our people and is an integral part of what makes our culture so special.

-Marty Bicknell, CEO, Mariner



Established 2009

The Mariner Foundation was established in 2009 to broaden Mariner's community impact by engaging associates under one common theme of to whom much is given much is expected. Our mission today is **to positively impact the lives of many** in the communities where our associates live and work. It is the foundation's vision to create positive change in our communities by embracing our associate's philanthropic passions.

Dollar-for-Dollar

The foundation is funded through associate contributions that are matched dollar-for-dollar by Mariner.

79% Participation

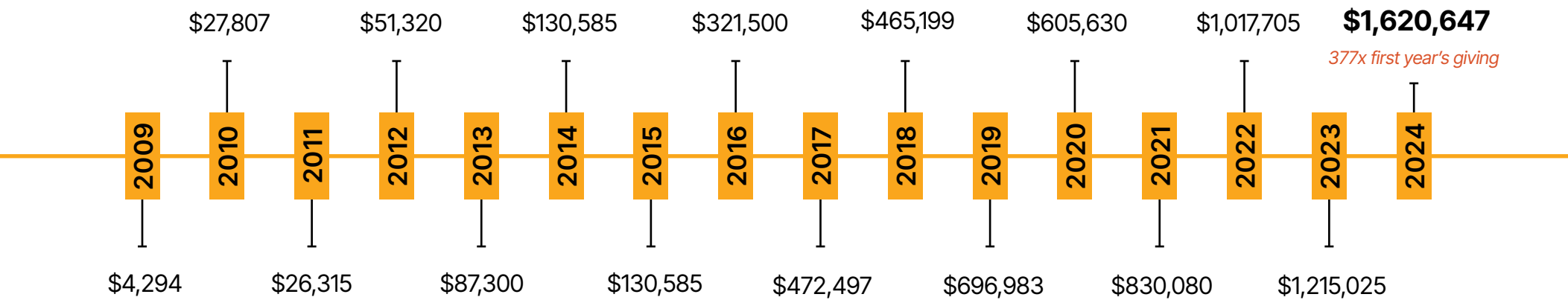
As a firm, our goal is to have 75% participation in charitable giving across all Mariner associates. In 2024 our participation was 79%.

MARINER

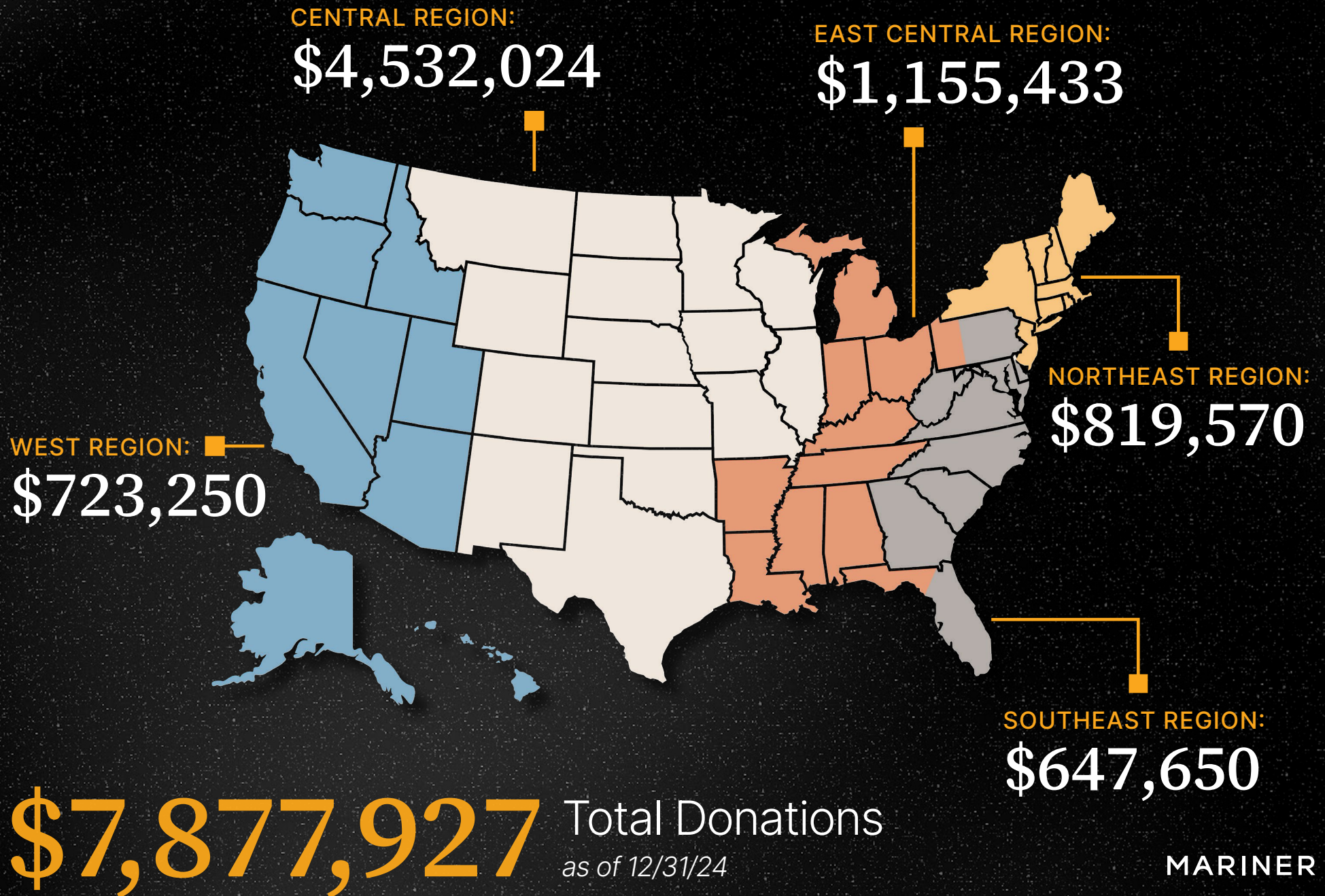
Giving History

Impact Report
2024

Making a Difference Since 2009



NATIONWIDE HISTORY OF GIVING



+Impact Day Spotlight

Impact Report
2024

+Impact Day is a day where all associates across the country are investing time in our communities. We do this to celebrate the inception of our company, to bring our associates together for a common purpose and to make a positive impact on the communities in which we live and work.

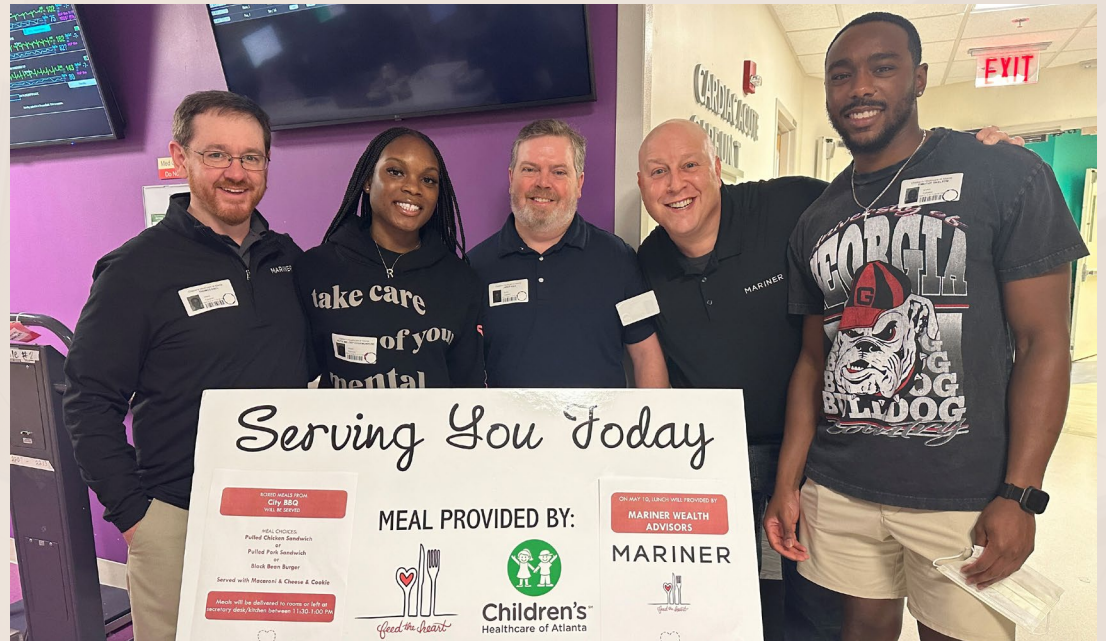
"For a child receiving care at Children's Mercy, hospitals can feel like a scary space and the comforts of home can feel a world away. A gift given with love can calm fears and dry the tears of even our littlest patients. The Mariner team's time onsite creating 'Happy Kits' for our patients not only brought joy and distraction for hundreds, but also helped improve their outcomes. We know when kids get to be kids during care — playing, having fun, and experiencing less anxiety — they get better faster. We could not be more grateful for Mariner's work to create that experience for so many of our families."

Andrew Garton, MBA, CFRE
Assistant Director of Philanthropic Giving
Children's Mercy Kansas City



+IMPACT DAY 2024

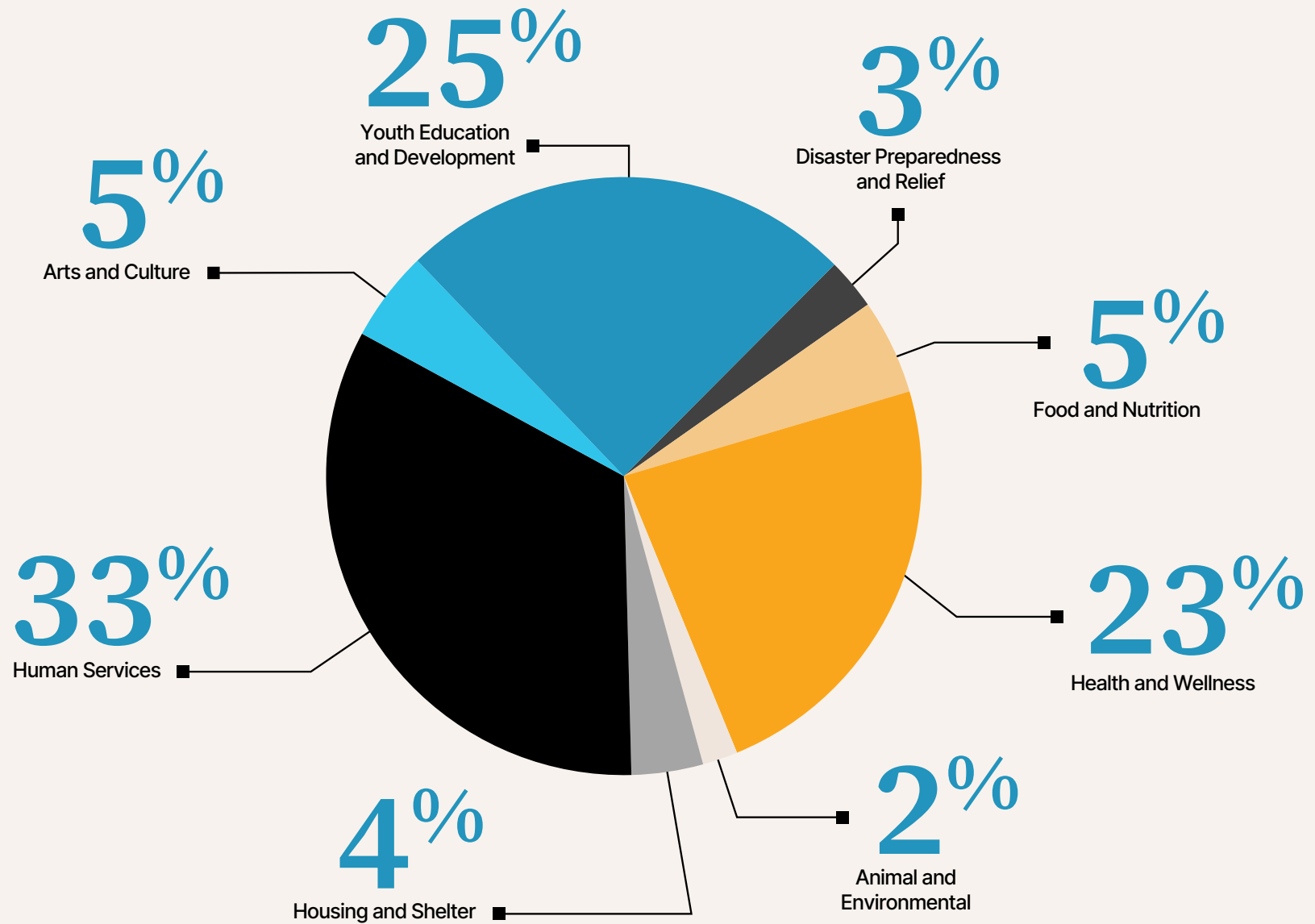
66 grants
68 locations
71 nonprofits



793 volunteers
2,171 volunteer hours

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GIVING BY SECTOR 2024





≈ \$120k

donated monthly

IN 2024



\$1,620,647 given

400+ granted grants

305 Pink Pack
360 Church
Ability KC
Adoption Options
AdventHealth FDN
Advocates for Bartow's Children
Africa Christian Ministries
Alayna Jayne FDN
Alisa Ann Ruch Burn FDN
Alison's Angels
All Saints Lutheran Church
Always Endure
Alzheimer's Disease and Related Disorders Association
Alzheimer's FDN of America
American Cancer Society, KC
American Cancer Society, NY
American Cancer Society, OK
American Lung Association
American Red Cross
Amigos Together for Kids
Anderson Community Lacrosse Club
Angelman Syndrome FDN
Arizona Musicfest
Arms of Hope Community
Artolution
Ashley Lauren FDN
Aspiring Youth Academy
Association
Atrium Health FDN
Backpack Society
Band of Angels
Beech Acres Parenting Center
Beloved and Beyond
Big Brothers Big Sisters, Greater KC
Big Brothers Big Sisters, Sun Coast
Bloom Here
Blue Springs School of Economics
Blue Valley West High School
Boys & Girls Club, South
Oakland County
Boys & Girls Clubs, Miami-Dade
Boys & Girls Club, Greater Dubu Que
Bra Couture KC
Branch15
Breakthrough Cincinnati
Brumby Elementary School FDN
Building All Children
California-Hawaii Elks Major Project
Camelot Therapeutic Horsemanship
Cancer Pathways
Candlelighters Childhood Cancer Family Alliance
Canine Assistants
CASA of Johnson and Wyandotte Counties
Cast Hope
Catholic Charities of Denver
CDM Services
Cen Clear Child Services
Center for American Culture and Ideas
Center of Hope
Centerwill

Central Texas Food Bank
Chair Force 1
Channel Islands Restoration
Chasin A Dream FDN
Child Focus
Children In Crisis
Children's Healthcare of Atlanta
Children's Hospital Colorado FDN
Children's Museum of Manhattan
Children's Museum of Phoenix
Cincinnati Children's Hospital Medical Center
City Gospel Mission
City Parks FDN
CityTeam Ministries
Cobb County Community FDN
Common Good
Common Ground
Communities in Schools of Mid-America
Community Arts STL
Community Basket
Community FDN for Western Iowa
Community Link Capital Region
Community Shares of Tennessee
Community Youth Center
Compass To Care
Concordance
Connor's Kindness Project
Contact Front
Cooperative Feeding Program
Cradles to Crayons
Cranston League for Cranston's Future
Crayons to Computers
Crohn's & Colitis FDN
CU Kids at Heart
Cystic Fibrosis FDN
Dance It Up
Davis Direction FDN
Denver Rescue Mission
DePaul Cristo Rey High School
Dignity Period
Douglas County Community FDN
Down Syndrome Innovations
East River Foster Parent Network
East Spring Branch Food Pantry
East Tennessee FDN
Edgehill Neighborhood Partnership
Education For All Children
Elevate Youth
Eis for Autism FDN
Embrace Kids FDN
Emerald Coast Children's Advocacy Center
Emily's Hope
Emmanuel Cancer FDN
End 68 Hours of Hunger
Epilepsy FDN of Colorado
Evans Scholars FDN
Exploration Place
Extra Special People
Fellowship of Christian Athletes
Females for Football

Firm Foundations Romania
First Call Alcohol/Drug Prevention and Recovery
First Tee Of Sarasota Manatee
Fleece & Thank You
Flint Hills Technical College FDN
Florida International University FDN
Food for Thought Outreach
Fostering Connections
Fostering Great Ideas
Friends for Animals of Metro Detroit
Friends of Kids with Cancer
Friends of Rock Valley
Friends of Sarasota County Parks
Friends of the Phoenix Center FDN
Frogs for Life
Fully Furnished Ministries
Gabby Krause FDN
Garfield High School FDN
Germantown Community Theatre
GiGi's Playhouse, Cincinnati
GiGi's Playhouse, Des Moines
Girl Scouts of San Jacinto Council
Girls Incorporated of Omaha
Girls on the Run NYC
Giving the Basics
Gleaners Food Bank of Indiana
Global Empowerment Mission

Grace Centers of Hope
Graceful FDN
Grace's Closet
Greater Cincinnati FDN
Greater Pittsburgh Community Food Bank
Greater Twin Cities United Way
Guyon Saunders Resource Center
H Foundation
Habitat for Humanity of Kansas City
Habitat for Humanity of Omaha
Halo Project International FDN
Hands On Nashville
HappyBottoms
Harlem Lacrosse and Leadership Corp
Harvesters
Head for the Cure
Healing House
Health Connect of South Dakota
Health Outreach FDN
Heart Heroes
Emily's Hope
Heart to Heart International
Heartland Equine Therapeutic Riding Academy
High Country Caregiver FDN
Hirshberg FDN for Pancreatic Cancer Research
Homeward Bound of Western North Carolina
Hope House
Hope Station

Housing Opportunities & Maintenance for the Elderly
Houston Middle School
Humble Sons Bike Company
Hungry Hearts
In the Name of Grace
Inclusion Connections
Intermountain Healthcare FDN
Iron Gate
Isaiah 117 House
JAFCO Children's FDN
James Arthur Albert FDN
Jared Coones Memorial FDN
JDRF International
Jerns Academy
Jersey Battered Women's Service
Jet Award FDN and Trust
Jewish Family Services
Jewish National Fund
Joan Dancy and PALS
Johnny Kinney Memorial FDN
Joni and Friends
Josh Neuman FDN
Joshua's Heart FDN
Joy International
Junior Achievement of Greater KC
Just In Time for Foster Youth
Kameron's Crusaders

Kansas Big Brothers Big Sisters, Wichita
Kansas Big Brothers Big Sisters, Crawford County
Kansas City Community Gardens
Kansas City Girls Preparatory Academy FDN
Kansas City Hospice and Palliative Care
Kansas City Scholars
KB Foundation
Kellsie's Hope FDN
Kid's Food Basket
Kids' Meals
KidsTLC
KIPP Chicago Schools
Kristi House
Ladies Empowerment and Action Program
Lake Washington Schools FDN
Lakota Fund
Latinas Leading Tomorrow
Lead to Read
Lekotek of Georgia
Leukemia & Lymphoma Society
Liv Like a Unicorn Corp
Loaves & Fishes
Loess Hills Alliance
Love Fund for Children
Lunch Is Served
Make-A-Wish of Arizona

Make-A-Wish of Missouri & Kansas
Mariah's Miracle
Market Street Mission
Martin City Melodrama
Math Circles of Chicago
Matthew 19:14
Matthew 25 Ministries
McDowell Sonoran Conservancy
Meals from the Heartland
Meals on Wheels of Greenville
Medical University of South Carolina FDN
Melwood Horticultural Training Center
Mental Health Association of South Central Kansas
Miracle League of Frisco
Morning Glory Ministries
Mother's Refuge
Nahma Educational FDN
Nathan's Ninjas
National Multiple Sclerosis Society
National Multiple Sclerosis Society Southern New York
Neighborhood Bridges
New Bethany
NewView Oklahoma
NextStep Kansas City
No Limits Cafe

Nobis Works
NoMi Kids FDN
North County Interfaith Council
NRHS AOF
Oak Cottage for Women
Oak Hills Educational FDN
Oceans Harbor House
Oklahoma Hemophilia FDN
One More Wave Surf
Operation BBQ Relief
Operation Breakthrough
Operation Give Back
Orange County United Way
Oregon Food Bank
Organization for Development of Indigenous Maya
Our Big Kitchen Los Angeles
Outdoor Outreach
Palm Beach County Food Bank
Pancreatic Cancer Action Network
Parkinson's FDN
Pathways of Hope
Pattinson's Academy
Pearl Project
Pedal The Cause
Pets Helping People
Pharmacy of Grace
Phil's Friends
Phoenix Children's Hospital
Plymouth Community Foster Closet

Amarillo Children's Home
Project CAR Call-a-Ride
Project Our Town
Quest in Recovery
Quincy Symphony Orchestra
Racers for Pacers
Rapid Response Omaha's Disaster Relief Team
Real Champions
Recovery Connections of Central Florida
Red Bank Regional Source FDN
ReDiscover
Release
Reliance Community Church
Resonance Center for Women
reStart
Richmond Community Theatre
Riverview High School FDN
Ronald McDonald House of Eastern Wisconsin
Ronald McDonald House of Kansas City
Ronald McDonald House of Dallas
Ronald McDonald House of Houston
Ronald McDonald House of South Florida
Ronald McDonald House of the Central Valley
Room in the Inn
Rose Haven
Rotary Club of Sarasota
Southside FDN
Ryan Nece FDN
SA Yes
Sacramento Valley Conservancy
Safe Children Coalition
Safehouse Crisis Center
Safenet Services
Salvation Army
Samaritan's Purse
Santa Maria Community Services
Saving Amy
Second Chance Ranch STL FDN
Second Harvest Food Bank of Central Florida
Selah's Heart
ShareWaves FDN
Sheffield Place
Shelter Association of Washtenaw County
Shepherd's Gate
Simon's Soup Kitchen
Simple Needs GA
Sleep in Heavenly Peace
South Brown County Health and Wellness Fund
South Dakota Military Heritage Alliance
South Jersey Breast Cancer Coalition
Southside Early Childhood Center
Special Education Enrichment FDN
Special Needs Assured
Spectrum Autism Support Group
St. Baldrick's FDN

St. John Center
St. Joseph Catholic Church Cottleville
St. Joseph Home
St. Jude Children's Research Hospital
St. Louis Society for the Blind
St. Mary's Food Bank Alliance
St. Patrick's Center
St. Vincent de Paul Society of Alameda County
St. Vincent de Paul Society of Denver
Starlight Theatre Association of KC
Sunflowers Academy
Sunrise Children's Services
Susanna Smiles
Take Stock in Children of Sarasota County
Team Rubicon
Teammates Mentoring Program
TFI Family Services
The Children's Place
The Contributor
The Little Light House
The Samaritan Center at the Jersey Shore
The Single Mom KC
The Woods Project
Thomas P. O'Sullivan IV FDN
Timothy Schenke Light of Hope Award Fund
Transform Scott County
Tulsa Ballet Theatre
Tulsa Day Center for the Homeless
Tulsa Girls Art School
Tulsa Youth Symphony
UnidosNow
United Mitochondrial Disease FDN
United Way of Greenville County
United Way of North Carolina
UpSpring
Vault Fostering Community
Ventura Center for Dispute Settlement
Veterans Community Project
Victory Life Church
Voices for Children
Washed Clean Addiction and Recovery Ministries
Washington Women In Need
Welcome House
Wesley Chapel Mission Center
Wesley United Methodist Church
West Texas A&M University
Westside Family Church
Windwood Farm Home for Children
Women's Division Christian Service
Worldwide Civility Council
Wounded Veterans Relief Fund
Yamhill Community Action Partnership
YMCA of Greater KC
Young Life, Eastern Cincinnati
Young Life, Redding
Young Life, West Houston
Youth Services of Tulsa
YWCA of Bethlehem

2024 Grant Recipients

\$7.8M+ given

ALL TIME

1,100+
organizations impacted

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*Our heartfelt thanks to every partner and
associate for the impact you made in 2024
and all that's still to come.*

For more information visit: mariner.com

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