



Generosity from the Top Down

Mariner Wealth Advisors is not your average financial services company. In an industry fixated on the numbers, Mariner Wealth Advisors focuses on impact. Since its foundation in 2006, the organization's leadership has been committed to fostering and facilitating a culture of generosity.

To realize this commitment, Mariner Wealth Advisors' founder and CEO Marty Bicknell conceived the Mariner Foundation—an internal foundation that employs a 1:1 corporate matching program for every dollar that associates contribute. Having a foundation with a corporate matching program is a way to encourage associates to make a difference by advocating for the charities and causes they care about most.

It was a revolutionary idea, but the firm did not have the staffing or expertise to operate it in-house. So, they partnered with The Signatry to efficiently run the back end of the foundation and facilitate their giving. "It's a seamless process," says Katrina Scott, Chief Investment Officer of Mariner Wealth Advisors and President of the Mariner Foundation. "The Signatry provides the efficiency we need to do really great work."

Mariner Wealth Advisor associates submit their grant requests to the Mariner Foundation for the causes they want to impact. The board reviews the requests to determine if the grant will be approved and how much will be given to the charity. By pooling the resources of the company, this creates a powerful tool for associates to make a real and lasting impact on local and national charities.

The results have been transformative. The foundation began in 2009, giving around \$30,000 per year. Ten years later, in 2019, associates pledged over \$500,000, which means more than \$1 million was available to be donated to associate-driven charities across the country. The foundation grants gifts on a rolling basis, so the foundation gives to more than 20 different charities each month, on average.

Mariner Foundation's success is the result of numerous initiatives and a lot of hard work. Bicknell leads by example and serves as a giving champion. Whether making videos, speaking at national events, or scheduling monthly happy hours, Bicknell has been instrumental in growing the foundation each year. His heart and enthusiasm for giving permeates the organization, and his support from the highest level has given credibility and prominence to the foundation and its mission.

To build a culture of generosity, the Mariner Foundation is incorporated into each step of the hiring process—from recruitment to interviews to orientation—to ensure new associates are aligned with the company's values. Internal awareness campaigns encourage associates to participate, and a volunteer committee consisting of representatives from every office meets with the board to stay connected and raise awareness in all of the firm's locations. An annual charitable giving campaign coincides with open enrollment for benefits to highlight their two vehicles for giving, the Mariner Foundation and the United Way. Volunteer events are held simultaneously by Mariner Wealth Advisors across the country to encourage associates to give back with their time and talents in addition to their finances.

When asked about the success of the Mariner Foundation, Scott attributes it to generosity being embraced from the top down. "It has been Marty driving it, it has been having an active board that helps to communicate it, and it has been having a group that is boots on the ground initiating it," she says.

With a participation rate of 75% from a staff of nearly 700, generosity has become a central pillar of the firm's culture, and they continue to innovate. "Giving makes people open up about things that they wouldn't otherwise. It creates more connection throughout the organization," says Scott. A wide range of associates means the company donates to a wide range of causes, which has opened the door for people to share their stories, ultimately bringing the company closer together.

Take Your Next Steps

This culture of generosity modeled here is just one way that businesses can create lasting impact. Engaging employees in the practice of generosity can become a transformative component in a business as the organization walks out values together.

Connect with The Signatry team to learn more about how you can incorporate generosity into your own business.

For more information, visit www.thesignatry.com.