

Dear Member,

We're excited to announce a new partnership between MCERS and Mariner, designed to support you throughout your entire career journey: "[From Hire to Retire and Beyond.](#)"

Here at Mariner, we're committed to providing comprehensive financial guidance tailored specifically for MCERS members. Through this partnership, we offer four key benefits:

- **Quarterly financial education presentations**, available both in person and online
- **Exclusive access to the Mariner Financial Wellness tool** (<http://www.marinerfinancialwellness.com>), with recordings of all sessions posted under the "Education" tab
- **30-minute one-on-one financial coaching sessions** with a Mariner advisor for all members
- **A comprehensive Pension Roadmap** available one to two years prior to your retirement. This roadmap includes:
  - a. Your pension meeting with Dawn Angerer, Retirement Specialist with MCERS, to outline your pension benefit. Followed by:
  - b. A complimentary 60-minute consultation with a Mariner Advisor to review your pension options. Resulting in:
  - c. A fully personalized and actionable retirement plan that takes into account your (and your spouse's) unique retirement needs and financial circumstances.

To make scheduling easy, members can use the QR code provided to submit an appointment request with a Mariner advisor, or email: [MCERS@mariner.com](mailto:MCERS@mariner.com). We'll reach out promptly to confirm a time/date for your coaching or Pension Roadmap meeting.



We look forward to supporting you on your path towards a confident retirement!

Sincerely,

**Brian Green**  
*Senior Institutional Advisor*

**Mike Grodi**  
*Chairman*

Mariner

MCERS

Financial education and coaching services are complimentary to members. Should a member decide to work with Mariner individually on an ongoing basis, such engagement would be subject to a separate agreement and relevant fees. Services to be provided by Mariner, LLC. Mariner and MCERS are not affiliated.

Mariner is the marketing name for the financial services businesses of Mariner Wealth Advisors, LLC and its subsidiaries. Investment advisory services are provided through the brands Mariner Wealth, Mariner Independent, Mariner Institutional, Mariner Ultra, and Mariner Workplace, each of which is a business name of the registered investment advisory entities of Mariner. For additional information about each of the registered investment advisory entities of Mariner, including fees and services, please contact Mariner or refer to each entity's Form ADV Part 2A, which is available on the Investment Adviser Public Disclosure website ([www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)). Registration of an investment adviser does not imply a certain level of skill or training.