

# CASE STUDY



## Mariner Wealth Advisors Leverages Flyer Financial Technologies for Scalable, Independent, and Modernized Option-Based Strategies

### ABOUT MARINER WEALTH ADVISORS

Mariner Wealth Advisors, a leading wealth management firm focused on providing tailored financial solutions to high-net-worth clients, has built a successful offering centered around option-based strategies. But as its Assets Under Management (AUM) grew significantly, the firm encountered challenges scaling their proprietary technology and mitigating associated risks. This case study examines how Mariner Wealth Advisors partnered with Flyer Financial Technologies to **enhance its system, reduce risk, and position itself to scale with future growth AUM.**

## MARINER

### BACKGROUND

Unable to find a suitable third-party solution, Mariner Wealth Advisors initially developed an in-house system to implement its option strategies. While this system served Mariner well for a decade, rapid AUM growth created complexities. Potential risks associated with a small team managing proprietary technology, like availability and knowledge gaps, became increasingly apparent. The limitations of its legacy system soon became roadblocks that couldn't be ignored.

The firm recognized the need to enhance their technology, reduce back-end risks, position its strategies for growth and focus on their core competency:

### WEALTH MANAGEMENT RATHER THAN SOFTWARE DEVELOPMENT.

### THE SOLUTION

## CO-PILOT OMS AND API INTEGRATION

Mariner Wealth Advisors sought a technology partner that offered **composability and adaptability**. It needed a solution that could seamlessly integrate with their existing system, enhancing its capabilities without requiring a complete overhaul. It also valued independence and the ability to choose a solution that fit its unique needs, rather than being constrained by a large, rigid ecosystem. After significant due diligence, Mariner Wealth Advisors ultimately decided to partner with Flyer Financial Technologies.

**“WE WANTED TO PIVOT BACK TO SAY LET'S PARTNER WITH FLYER AND WE CAN REALLY ENHANCE OUR SYSTEM THAT WE USE.”**

**– BRETT KUNSHEK**

*Head of Options and Structured Notes at Mariner Wealth Advisors*



**Illuminating the firm's desire for a partner who could augment its existing infrastructure rather than replace it.**

## THE SOLUTION

By partnering with Flyer Financial Technologies, Mariner Wealth Advisors successfully overcame the limitations of their legacy system. Flyer's open API infrastructure allowed for seamless integration, complementing their existing technology. This composability enabled Mariner Wealth Advisors to add functionality and offload back-end risks without disrupting their established workflows.

Flyer's independent and agile structure provided the **flexibility to tailor solutions to Mariner's specific requirements**, while the cloud-native, API-driven platform provided a modern solution that could scale with the firm, addressing the challenges of scaling in an increasingly complex environment.

**Specifically, the partnership allowed Mariner to:**

- ✓ **ADD FUNCTIONALITY**  
Incorporate new features and capabilities to support their growing business.
- ✓ **REDUCE BACK-END RISK**  
Offload the risks associated with managing proprietary technology to an experienced partner.
- ✓ **FOCUS ON CORE COMPETENCIES**  
Shift their focus back to wealth management and providing excellent service to clients.

★ **Flyer's hosted solution proved to be the ideal choice for Mariner, providing the adaptability needed to scale their operations and prepare for the next decade of growth.**

## THE FLYER EFFECT

**Mariner's partnership with Flyer has enabled the firm to:**



### SCALE THEIR OPERATIONS

Support their rapidly growing AUM and client base.



### MITIGATE RISKS

Reduce the risks associated with managing proprietary technology and ensure system reliability.



### ENHANCE EFFICIENCY

Improve operational efficiency and streamline workflows.



### POSITION FOR FUTURE GROWTH

Lay a solid foundation for continued growth and success in the future.



The partnership turned out to be

**"THE BEST SOLUTION AND THE BEST DECISION WE'VE MADE"**

to get to the next 10 years. This was largely due to Flyer's ability to provide a solution that was composable, adaptable, independent, and capable of overcoming legacy system limitations.

– **BRETT KUNSHEK**



**Smarter portfolio management starts here.**

See why Flyer is the modern rep-as-PM choice.

<https://flyerft.com>

FLYER FINANCIAL TECHNOLOGIES | © 2025 FIX FLYER, LLC. ALL RIGHTS RESERVED.

