

CASE STUDY

# Mariner Offices Drive Revenue and Growth with Vanilla

State Health

Healthy

Estate Tax Exposure

\$67,139,394

\$4.9M in potential tax savings

In Progress

Taylor Family Basic Revocable Trust

Last updated 2 days ago



Est. Tax Savings

\$4.9M

at age 95 at 5% growth

Total Family Wealth

Net to Beneficiaries

Estimated Estate Tax Liability

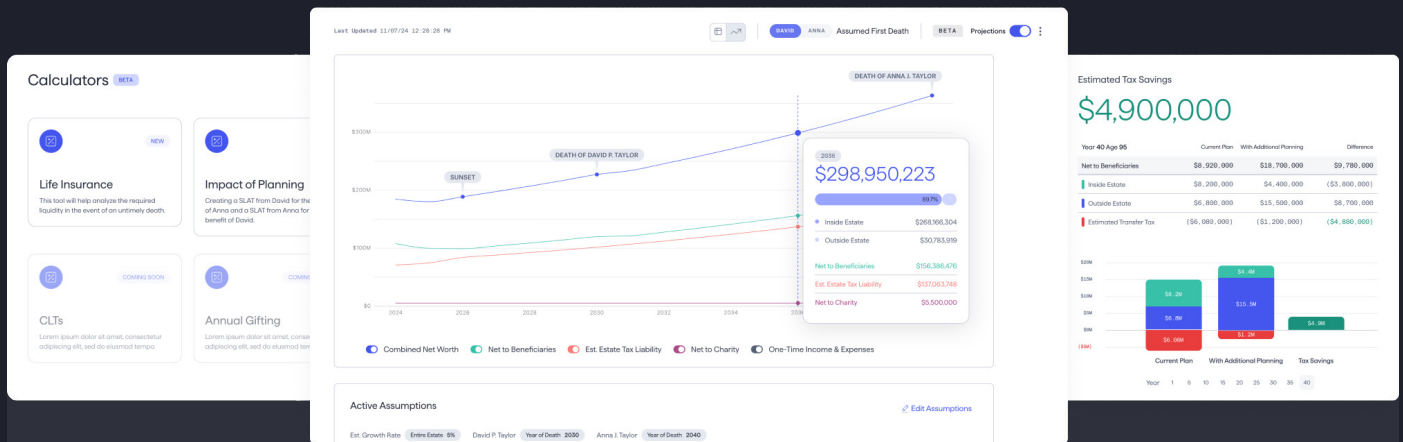
Scenario A

Funding SLAT for Michael with full remaining exemption and funding 3-year GRAT with \$1M of Leonard co.

Utilize remaining exemption

# Background

Mariner Wealth Advisors, a prominent nationwide wealth advisory firm with nearly 50 regional offices, was focused on accelerating revenue growth across its network. And they recently conducted an in-depth analysis of its performance metrics to uncover the impact of Vanilla's estate advisory platform on business growth. The results were striking: offices that actively engaged with Vanilla experienced significantly higher growth and revenue. This case study explores how Mariner leveraged Vanilla to drive success across its offices, offering insights that could apply to any advisory practice aiming to elevate growth.



## Mariner's Explorations of Vanilla's Impact

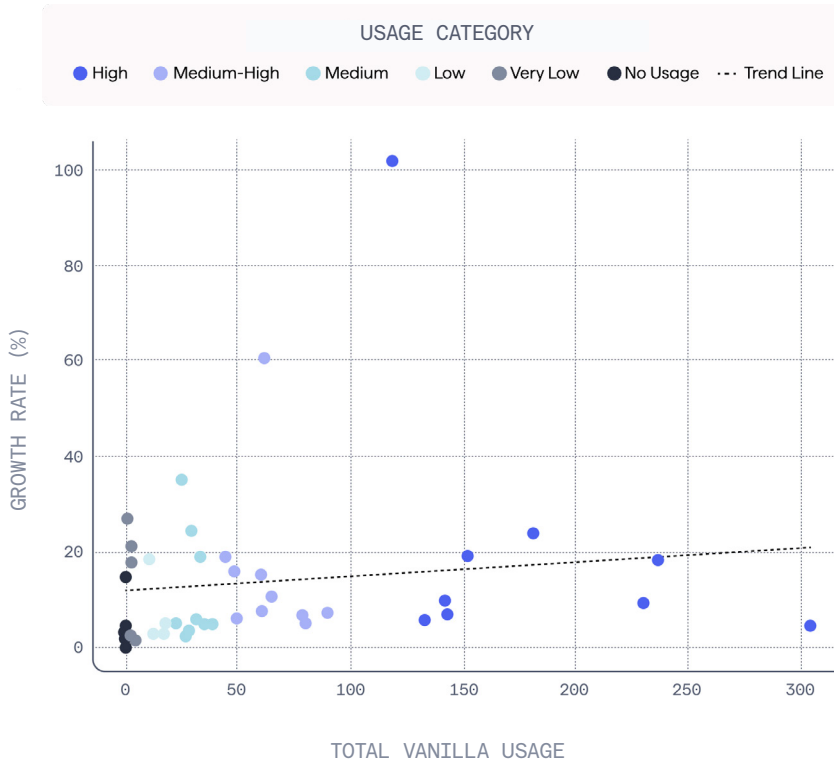
Mariner set out with a clear objective—to determine if their investment in Vanilla's estate advisory platform was truly delivering value. By analyzing data across various offices, they categorized usage into a range of categories from high to low and no usage to understand its influence on financial outcomes. What they discovered was a direct correlation between usage and enhanced performance.

# What the analysis showed

Offices that fully embraced Vanilla's estate advisory platform achieved an average revenue of **\$11.75 million** and a **growth rate of 21.84%**, significantly outperforming their low or no usage counterparts.

In fact, high-usage offices experienced a **2.2x increase** in growth rates compared to those with low or no usage, which averaged just 9.41%. When it comes to revenue, the difference is even more striking: high-usage offices saw **5.2x higher revenue** than offices that didn't use the platform at all, which averaged \$2.25 million.

## Growth Rate by Total Vanilla Usage

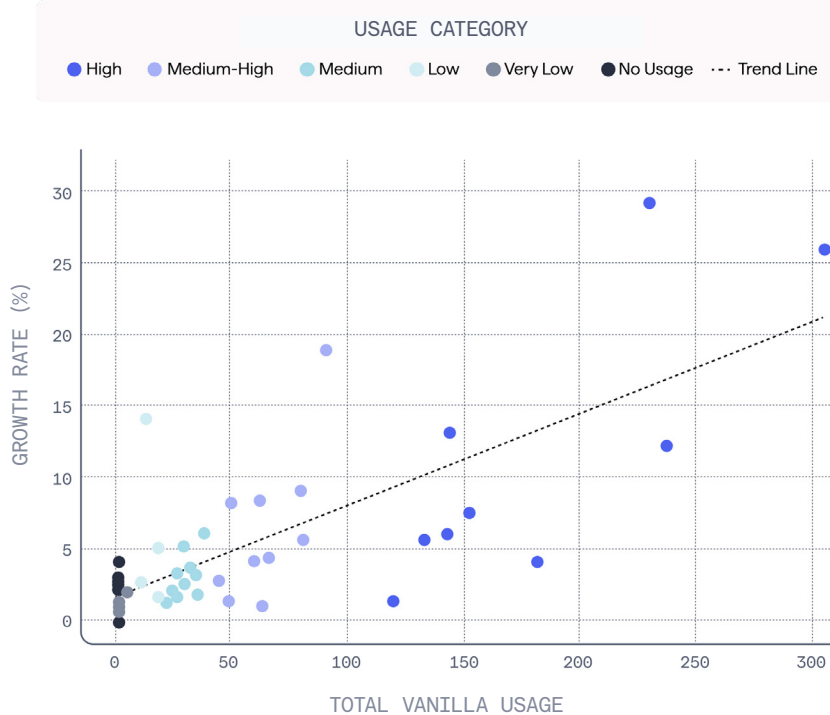


**21.84%**  
growth rate

**2.2x**  
increase in  
growth rate

**5.2x**  
higher revenue

# Not just high usage offices saw improvements



Medium-High and Medium Usage Offices

**\$6.9 mil**

average revenue

Low Usage Offices

**\$3.5 mil**

average revenue

No Usage Offices

**\$2.25 mil**

average revenue

## Medium-High and Medium Usage Offices: Solid Performers

The trend continued with medium-high and medium usage offices. While they weren't utilizing Vanilla's platform to its full potential, they still saw impressive results. Offices with medium-high usage achieved average revenues of **\$6.9 million and a growth rate of 15.06%**. Medium usage offices followed with \$3.3 million in revenue and a 10.4% growth rate. This indicates that even moderate engagement with Vanilla makes a meaningful impact.

## Low Usage Offices: Room for Growth

Offices with lower engagement painted a different picture. The "Low Usage" group had an average revenue of \$3.5 million and a growth rate of 6.9%. These figures suggested that increased and more consistent use of Vanilla could unlock untapped potential and drive further growth.

## No Usage Offices: A Clear Gap

Offices not using Vanilla at all lagged significantly behind, with an average revenue of **\$2.25 million and a growth rate of 7.12%**. This gap underscored Vanilla's value—those who hadn't adopted it were missing out on the growth and revenue benefits seen in higher usage groups.

# Conclusion: A critical growth driver

For Mariner Wealth Advisors, the analysis made it clear: deeper engagement with Vanilla's estate advisory platform correlates with higher growth rates and revenue. **High-usage offices experienced growth rates up to 21.84%, far outpacing their low or non-usage counterparts**, who averaged just 9.41% growth. This translated to millions in additional revenue, affirming Vanilla's role as a crucial growth driver.

**The insights offer a compelling message:** fully leveraging Vanilla's estate advisory platform can make a noticeable difference in an advisory firm's performance. It's not merely about having access to the platform; it's about deeply integrating it into your practice to unlock its full potential. These results clearly show that deeper engagement with Vanilla's estate advisory platform is directly linked to significant increases in both growth and revenue, making it an invaluable asset for firms looking to drive measurable outcomes.

