



Tim Walters

**Senior Institutional Advisor
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Tim is responsible for the oversight and management of client relationships, striving to exceed client expectations by delivering excellent service through developing investment policy guidelines, optimizing investment portfolios, selecting investment managers, presenting performance-monitoring reports, and conducting trustee education on a wide range of investment topics. He also helps to ensure clients receive accurate documentation and reports on their timeline, maintaining current knowledge of each client's manager lineup and general market issues. Tim acts as the primary point of contact in relation to all servicing issues related to the client and is required to be proactive in communication regarding portfolios, firm, and plan issues as they arise. Tim may leverage Mariner's colleagues as required in order to meet the clients' varying needs. Prior to joining Mariner, Tim was a senior consultant at AndCo, an investment consulting firm that was acquired by Mariner. While here, Tim assisted with client service, investment policy development, and asset allocation strategy. Tim also focused on manager structure implementation, plan monitoring, evaluation, and advisement. Tim has a bachelor's degree in economics from Denison University.