



MARSHALL FINANCIAL GROUP

CORE VALUES

OWN IT!



- We value individuals that take accountability, get things done, and own any situation that is thrown their way.
- Our team members work hard and have a great work ethic.
- We are results driven and focus on the best outcomes in every situation.
- Our team is honest and always honors the commitments we make to our clients and colleagues.
- We are the solution, and we look inward to take action.

BE COOL



- Our team is not afraid of pressure, and we thrive during difficult times. We turn coal into diamonds.
- We get along, we take the high road, and we always look at the glass half full.
- Our team members have extremely positive attitudes.
- We strive to create long-lasting positive connections with all clients, team members, and business partners.
- Our honesty, transparency, and ethical conduct makes us feel good – and feeling good is cool.

DUCKS IN A ROW



- We are efficient and well organized, turning mess into order so we can consistently deliver quality work.
- Our clients have placed their faith in us, and our team anticipates their needs because we value and respect their trust.
- We come prepared to meetings, ready to be supportive and collaborative with our clients and colleagues.
- Our team works in harmony to obtain the best possible outcomes in every situation.
- We turn clutter and uncertainty into simplicity and clarity.

WOW FACTOR



- We want the experience of working with our firm to be so good that clients brag about it.
- Our team believes in over communication, and exceptional responsiveness.
- We go above and beyond our clients' expectations.
- Our team will find answers to questions that we don't know.
- We aim to be best in class in everything we do.

SMART GROWTH



- We believe that intelligent forward progression is essential for our clients and for our business.
- Our team continuously strives to find a better, more efficient way to do things.
- We proactively pursue ways to improve our health, financial, and emotional wellbeing.
- Our clients rely on us because we avoid unnecessary risks while balancing opportunities.
- We have a long-term perspective, and we avoid the new shiny object.