MARSHALL FINANCIAL GROUP

410.563.1190 info@marshallfinancialgroup.com marshallfinancialgroup.com

MARSHALL FINANCIAL GROUP

TABLE OF CONTENTS

03. What to expect

05. How we partner with you

06. Who we are

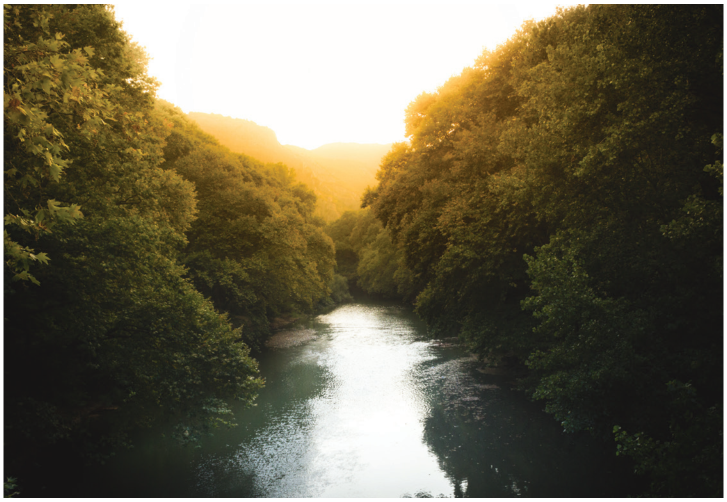
07. Contact us

WHAT TO EXPECT

This section includes: New Client Onboarding | Annual Client Touchpoints| Our Technology

NEW CLIENT ONBOARDING

As a new client, we are committed to making sure you are confident and secure in the transition to our firm. You can expect that we will engage you in a review of your current financial position and work to develop a clear understanding of your financial and life goals. We incorporate these into a personalized plan and investment strategy designed to enhance the successful attainment of all that is important to both you and your family. Our team of advisors and administrators work together to create a seamless path for you to become part of the Marshall Financial Group family.



Clients that join us through a merger or partnership with their current advisor experience our professional dedication to personalized planning and investment strategies. During the initial introduction, we meet with you and your advisor to discuss the transition and the additional value we can provide through our wide array of services and innovative technology. We promote continuity between your current financial goals and our firm's experienced approach to investing and portfolio management. Our dedicated client service team has developed a transition process that incorporates our detailed approach to financial planning and reporting.

ANNUAL CLIENT TOUCHPOINTS

The client experience:

1.

ANNUAL REVIEW

We meet, update your financial plan and modify your goals if applicable.

2.

QUARTERLY INVESTMENT PERFORMANCE UPDATES

3.

MONTHLY INSIGHTS AND NEWS

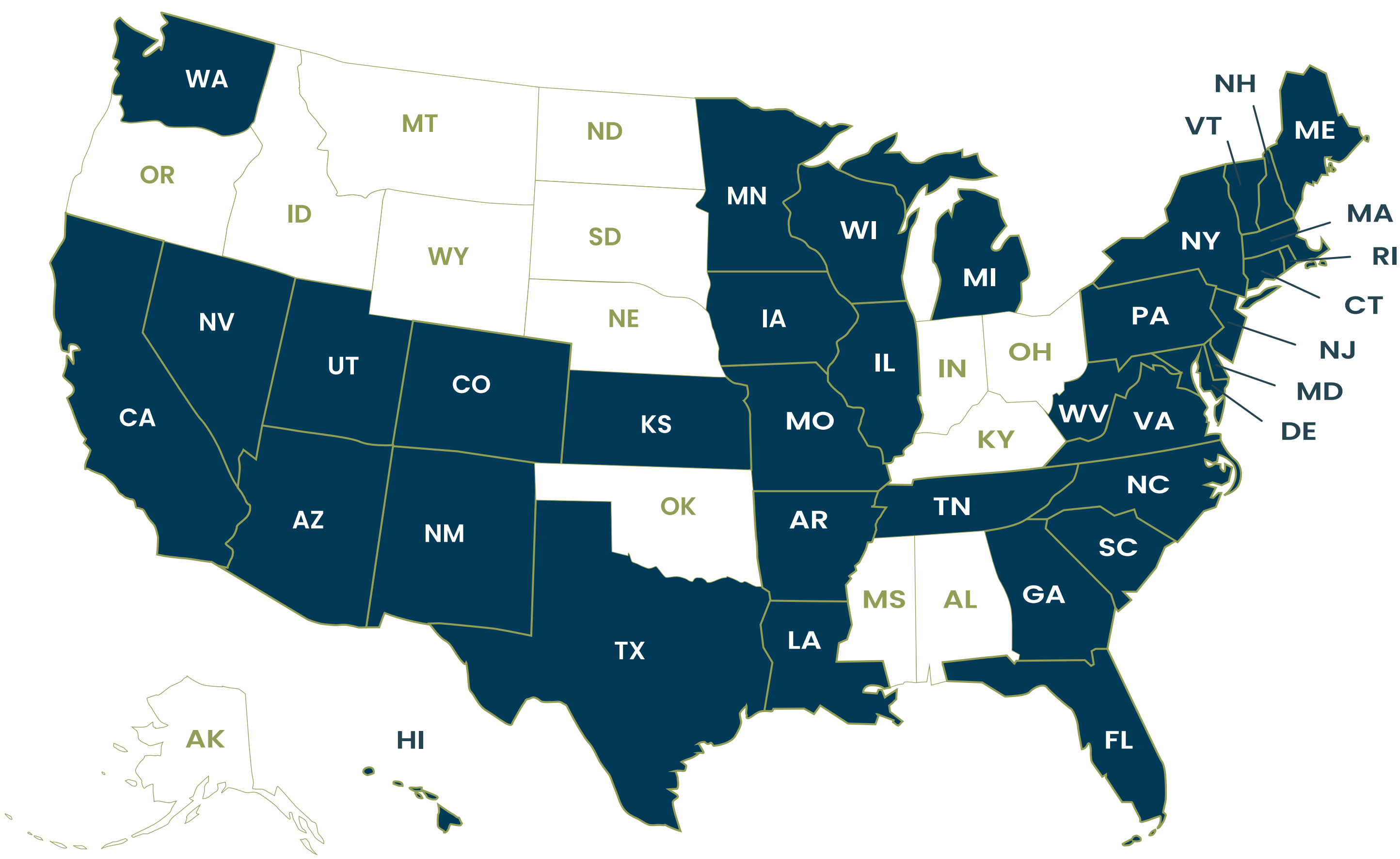
OUR TECHNOLOGY

In our work with each client to create a financial plan, we employ technologies and services that enhance the efficient use of your financial resources and the achievement of overall goals. Account transitions, performance reports, regular strategy meetings, and a comprehensive financial plan are all part of our superior client experience. The Marshall Financial Group team is dedicated to providing exceptional customer service and care for each of our valued clients.

HOW WE PARTNER WITH YOU

Marshall Financial Group welcomes new clients from a range of sources including referrals from our clients as well as other professionals, workshops and educational events, and through mergers and partnerships with other financial practices. We are a robust team of financial advisors and administrators who provide sound guidance and support for all of our clients.

Marshall Financial Group works with a range of clients to help identify and pursue their personal and financial goals as well as help to create and maintain a meaningful, fulfilling life balance for both our clients and our team.



States Marshall Financial Group has clients in

States with no clients

WHO WE ARE

KEY EXECUTIVES

PETE MARSHALL
CEPA, Managing Partner,
Senior Financial Advisor

SHERYL PARKS
MSF, CFP®, CDFA®, Partner,
Director of Financial Planning,
Senior Financial Advisor

ANTHONY PUGLIESE
AIF®, Partner,
Director of Investment Management,
Senior Financial Advisor

RUSS ARMSTRONG
Senior Financial Advisor

ANDREW HASZ
Financial Advisor

KYLE VENDITTI
Financial Advisor

CLIENT SERVICES & OPERATIONS TEAM

LINDY MARSHALL
VP, Administration & Marketing

HOLLY BERGEN
Executive Coordinator

LISA PEZZELLA
Client Service & Operations Specialist

THOMAS MCANDREW
Client Service & Operations Specialist

SARAH JONES
Client Service & Operations Specialist

CONTACT US

MARSHALL
FINANCIAL
GROUP

THANK YOU.
THANK YOU.
THANK YOU.

We appreciate the time you have taken to learn about our firm and we hope to learn about you. If you have questions, we're happy to provide honest and straightforward answers.

410.563.1190

info@marshallfinancialgroup.com

marshallfinancialgroup.com

Main Office:
225 International Circle, Suite 102,
Hunt Valley, MD 21030