




MARSHALL
FINANCIAL
GROUP

ANNUAL REPORT

2024

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 marshallfinancialgroup.com



MARSHALL FINANCIAL GROUP

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STATE OF THE FIRM

Dear Clients and Friends,

As we reflect on 2024, we want to take a moment to sincerely thank you, our clients, for an incredible year. Your continued loyalty inspires us to do our very best, and it's an honor to help you and your families along the way.

Here is a quick recap of 2024:

CONTINUED GROWTH

We are excited to share that our firm has experienced remarkable growth this year. We saw a 23.49% increase, representing \$127 million in additional AUM. We are thankful for every opportunity to serve you as we grow.

NEW OFFICE

To accommodate this growth and better support our expanding team, we moved to a new office. This space reflects our commitment to providing a welcoming, professional environment for both our clients and our team. If you are in the neighborhood, we look forward to hosting you!



NEW WEBSITE

In 2024, we also launched a **new website** designed to better reflect who we are as a firm and the value we provide. It offers easier navigation, helpful resources, and insights into the team dedicated to serving you.

EMPLOYEE WELLNESS PROGRAM LAUNCHED

As Richard Branson famously said, "If you take care of your employees, they will take care of the clients." With that in mind, we introduced our employee wellness program this year. We believe that supporting the well-being of our team helps them provide an exceptional service to you.

ESTATE PLANNING INITIATIVES

Caring for your financial future means ensuring your estate plans are in place and aligned with your goals. This year, we focused on expanding our estate planning services to provide even more comprehensive support, helping you secure your legacy for generations to come.

EXPANDING OUR TEAM

We welcomed several talented new team members this year who seamlessly embody our core values. Their fresh perspectives enhance the service we provide to you.

- **Cheryl Stuart**, Senior Financial Advisor & Director of Wealth Management
- **David Gasper**, CIMA[®], Associate Financial Advisor
- **James Williamson**, Associate Financial Advisor
- **Katie Bredlow**, Client Service Associate
- **Robin Stacey House**, Senior Financial Advisor

TEAM HIGHLIGHTS

We are incredibly proud of our entire team, and wanted to point out a few achievements:

- **Sheila Diaz, FPQP, Operations Specialist**, received the **STAR AWARD**. MFG created this internal annual award to recognize an exceptional team member.
- **Russ Armstrong, CFP[®], CIMA[®]**, was promoted to **Lead Advisor**.
- **Andrew Hasz, MBA** advanced to **Senior Financial Advisor**.

WORK HARD, PLAY HARD

We believe in balancing dedication with fun and giving back to the community. In 2024, our team bonded through events like the Polar Bear Plunge, Chili Cook-Off, White Water Rafting, Crabbing, Bowling, and volunteering at First Fruits Farm. These experiences strengthen our team and fuel our passion for serving you.



STRATEGIC DIRECTION FOR 2025

Looking ahead to 2025, we're committed to being best in class. Our priorities include:

- **Client relationship system improvements** and enhanced use of data to better serve you.
- Expanded **estate planning services** and **strategic partnerships**.
- Streamlined **surge appointments** to optimize our client service.
- Continued **office expansion** and **CPA partnerships**.
- Encouraging **Google Reviews** to showcase the work we're so proud to do.

THANK YOU

Finally, we want to express our heartfelt thanks to you, our wonderful clients. I am continually humbled by our growth and the relationships we've built. Each member of our team values you more than words can convey.

Wishing you and your family a healthy, joyful, and prosperous 2025. Thank you for choosing us to be part of your journey.

Warm Regards,

A handwritten signature in black ink that reads "Pete Marshall".

Pete Marshall, CEPA®

Managing Partner, Senior Financial Advisor

 410.563.1044

 [Schedule a call](#)

 pete@marshallfinancialgroup.com

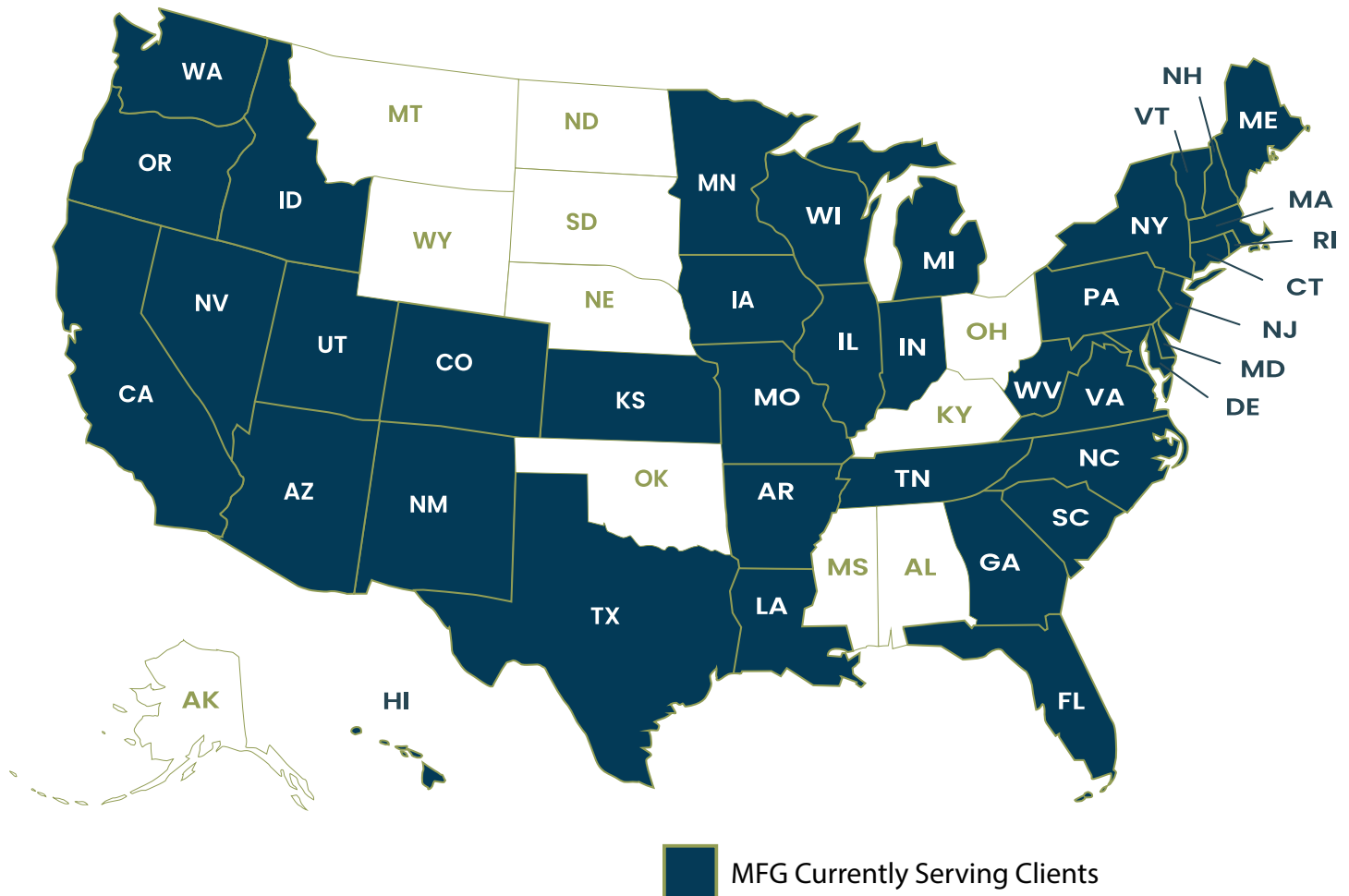
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MFG CLIENTS

Some firms serve a narrow client base, while MFG takes pride in working with individuals from a wide range of professions, life stages, and backgrounds. What unites our clients is their desire for a financial team that delivers sound guidance and exceptional support. It's a privilege to understand your personal and financial goals and help you build and maintain a meaningful, balanced life for you and your family.

WHERE MFG CLIENTS LIVE

Geography is no barrier to exceptional service. Thanks to our advanced technology and dedicated support team, MFG proudly serves clients from coast to coast — and everywhere in between. No matter where you call home, we're here to provide the financial expertise and support you need. We're excited to grow and continue expanding our reach, and we always welcome your referrals.

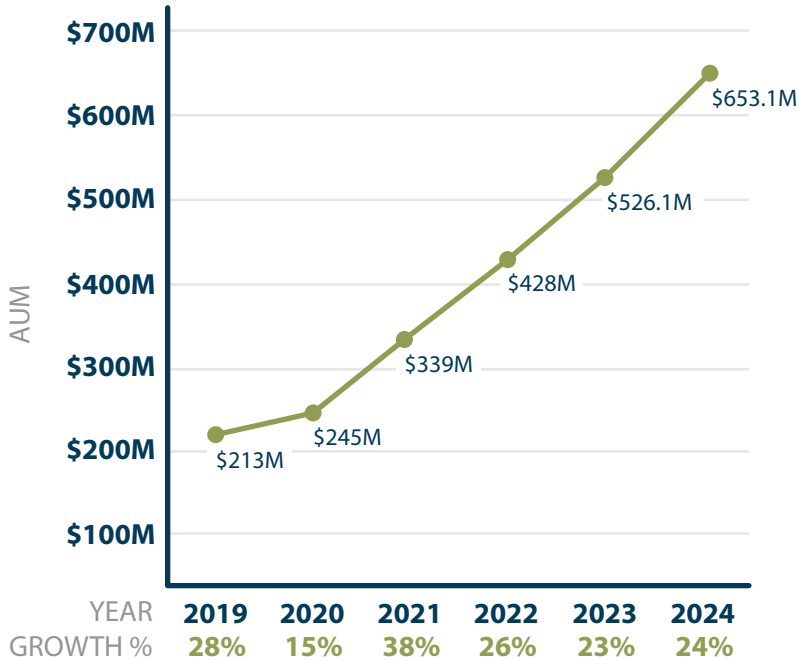


“MFG’s support is genuine, personal, professional and greatly appreciated.”

- Gladys, MFG Client

PLANNING & INVESTMENT MANAGEMENT

GROWTH CHART OF AUM OVER PAST 5 YEARS



TOTAL AUM

\$653.1M

TOTAL TEAM MEMBERS

17

TOTAL CLIENTS

701

AVERAGE CLIENT SIZE

\$931.7K

*Numbers correct as of 01/10/25.



2024 NEW ASSETS:

\$127,414,633

2024 FIRM ASSETS:

\$653,120,000

OF TRADES IN 2024:

180,390

TRADING ERRORS CORRECTED:

90

ACCURACY RATE:

99.99%

“Kudos to our trade desk team for delivering almost 100% accuracy in 2024!”

- Pete Marshall, CEPA®,
Managing Partner,
Senior Financial Advisor

TEAM UPDATES

JUNE 17TH 2024



DAVID GASPER, CFP®, CIMA®
Associate Financial Advisor
joined the MFG team

JUNE 17TH 2024



JAMES WILLIAMSON
Associate Financial Advisor
joined the MFG team

JULY 10TH 2024



ROBIN STACEY HOUSE
Senior Financial Advisor
joined the MFG team

JULY 23RD 2024



KATIE BREDLOW
Client Service Associate
joined the MFG team

AUG 28TH 2024



CHERYL STUART
Senior Financial Advisor &
Director of Wealth Management
joined the MFG team

YOUR TEAM

Marshall Financial Group is committed to delivering exceptional service to our clients. To ensure this, each client benefits from our dedicated team:

OUR ADVISORS



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
CFP®, CIMA®, Senior Financial Advisor



ROBIN HOUSE
CCFS®, Senior Financial Advisor



CHERYL STUART
Director of Wealth Management, Senior Financial Advisor



ANDREW HASZ
Senior Financial Advisor



KYLE VENDITTI
Financial Advisor



DAVID GASPER
CFP®, CIMA®, Associate Financial Advisor



JAMES WILLIAMSON
Associate Financial Advisor

OUR CLIENT SERVICE & OPERATIONS TEAM



HEATHER SEDA
Chief Operating Officer



LINDY MARSHALL
Corporate Strategist



SHEILA DIAZ
Operations Specialist



HOLLY BERGEN
Senior Executive Coordinator, M&A



THOMAS MCANDREW
Client Service Associate



KATIE BREDLOW
Client Service Associate

MILESTONES

While 2024 brought significant achievements, as highlighted in Pete’s State of the Firm on page 3-5, we also had the pleasure of celebrating several key milestones:

Legacy Planning

Introduced a comprehensive legacy planning document to help clients prepare their families beyond life.

Times Square Closing Bell

A momentous occasion ringing the closing bell in Times Square, symbolizing our continued growth and success.



Community Engagement

We believe in giving back to our community.

As a firm, we donate to several programs that directly serve our local, national and global community. In addition, we donate hundreds of hours of volunteer time annually and are proud to do our part to make our community a better place to work and live. Some of the organizations we supported directly this year are:

The Special Olympics through the MD State Police, Super Plunge Event

River Valley Ranch

CROP Hunger Walk Resources

There Goes My Hero

First Fruits Farm



Many Hands





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THANK YOU.
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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. Earning your business and your trust is our top priority.

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