Marshall Financial Group

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Company Overview

Marshall Financial Group is a boutique, personal planning firm nestled in picturesque Doylestown, Pennsylvania. For nearly 40 years, Marshall Financial has been part of Doylestown's rich culture, artisanal diversity and historic charm, which are easily accessed by New York and Philadelphia residents.

As an independent Registered Investment Advisor, Marshall Financial emphasizes a client-centric, holistic planning process focused on improving the quality of life for the families we serve. An environment conducive to employee satisfaction, work/life balance and personal prosperity are important drivers of our success. To foster a team approach, we make a substantial investment in each employee through continuing education, training, and ownership. As an employee owned company, every full-time employee is on the path to ownership as soon as they join us, with the expectation they'll be part of our family for a very long time.

Position Description

The Associate Planner is an early-career client relationship management position that provides technical support for the Lead Planner and/or Senior Planner. Responsibilities include data gathering, modeling, case design, scenario building, plan development, and presentation development. The Associate Planner may participate in client meetings but typically not in a decision-making capacity.

Duties and Responsibilities

The Associate Planner can expect to focus in the following areas:

- Gather, organize, and synthesize client data within a financial planning context
- Prepare client financial plans and presentations for review by Senior Planner
- Prepare financial scenarios
- Attend client meetings in a technical, supporting, and learning role
- All employees are expected to rise above their position requirements when necessary to assist clients, prospective clients, management and/or other associates

- A positive, warm and enthusiastic workplace is vital to our success. Associates will strive to maintain an uplifting environment that nurtures productivity and positive expectations of themselves and other coworkers.

Qualifications

The Associate Planner position typically requires the following qualifications:

- Solid academic track record
- Bachelor's Degree from an accredited college or university
- CFP® or actively working toward CFP® designation
- Proficiency with Word, Excel, PowerPoint and Outlook
- Detail-oriented, accurate, organized, able to set priorities
- Strong written and verbal communication skills
- A proactive mindset
- Team player, collaborative mentality, ability to work with and through others
- Desire/ability to work successfully in a small company environment

Salary and Benefits

Pay/benefits are competitive based on industry standards.

- Salary based on experience
- Participation in Incentive/ Bonus plan
- Benefits include dental, health care, 401(k)
- Financial support for professional accreditation/continuing education requirements and other education/training opportunities
- Participation in Employee Stock Ownership Plan

If you are interested, please submit your resume and cover letter to hello@marshallfinancial.com

Marshall Financial Group is an Equal Opportunity Employer.