

Marshall Financial Group

33 West Court Street, Doylestown, PA 18901

o: 215.348.9393 | f: 215.348.7971

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.

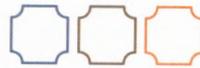
Position Description

The Financial Planner position requires an experienced individual with client relationship management skills and a high degree of intellectual curiosity. The individual should understand and value the importance of delivering a superior client experience and exceptional service. The ideal candidate has a strong technical understanding of financial planning concepts and the ability to effectively distill complex planning strategies to clients. Equally important is the ability to empathize and relate with other employee owners and our client families, which is imperative to the firm's long-term success.

Responsibilities include participation in all aspects of the financial planning process for new and existing clients.

Duties and Responsibilities

- Serve as a primary point of contact for clients
- Gather, organize, and synthesize client data within a financial planning context
- Prepare and provide analysis for client financial plans and presentations
- Prepare financial planning strategies for tax, retirement, insurance, estate and other planning components as they relate to a client's goals and objectives
- Communicate and collaborate with a client's outside advisors (CPA, Estate Attorney, etc.)
- Participate in the continuous improvement of our firm's standards
- Possess a high degree of self-motivation with the ability to work effectively as part of a team to deliver superior client experience
- Rise above position requirements when necessary to assist clients, prospective clients, management and/or other associates



- Strive to maintain an uplifting environment that nurtures productivity and positive expectations of themselves and other coworkers, to foster a positive, warm and enthusiastic workplace

Qualifications

The Financial Planner position typically requires the following qualifications:

- Demonstrated financial planning experience
- CFP® certification
- Bachelor's Degree from an accredited college or university
- Experience with FinTech solutions. MoneyGuidePro, Junxure and Orion experience a plus
- Analytical mindset, 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.

Opportunity for advancement

- Salary based on experience
- Participation in Incentive/ Bonus plan
- Benefits include dental, healthcare, 401 (k)
- Flexible schedule and remote work access capability
- Generous vacation schedule
- 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.