

MARSHALL
FINANCIAL
GROUP



Working with Marshall Financial Group

Your financial future is too important to risk working with the wrong advisor. That's why we developed a clear process to help you get to know our team and make an informed choice about working with us.

This guide outlines exactly what to expect when working with Marshall Financial Group, from initial consultation to ongoing partnership.

WHAT TO EXPECT

Your Timeline for Personalized Financial Guidance

Initial Consultation --- PHASE ONE - WEEKS 1 - 2

Your initial consultation is an opportunity to meet our team, learn about our capabilities, and explore how we could work together. It is an informal conversation: no pressure to share private information or make a decision about partnering with us.

During the consultation, you may wish to discuss:

- Your expectations and goals for financial advice
- Your history of working with other advisors
- Your potential reservations about working with a new advisor

These topics will help us understand where you're coming from, but they are not mandatory. The goal during this phase is to help you assess our services and determine whether our advisors are a good fit for you.

WHAT YOU NEED TO KNOW

Three Principles for Our *Discovery Process*

Flexibility

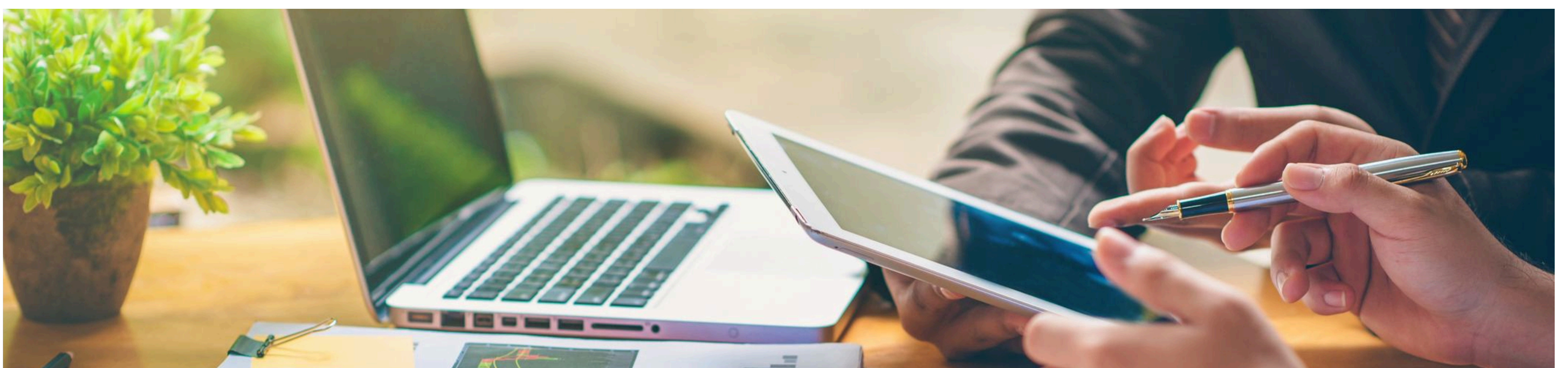
There is no fixed timeline; you can always request another meeting if you're unsure about the fit—and raise questions about our service at any moment.

Confidentiality

Whatever you share during the initial and ongoing consultations is confidential. Our advisors value integrity and non-judgment, aiming to create a space where you can feel safe sharing your financial anxieties and goals.

Respect

We value your time and respect how uncomfortable meeting with a new advisor can be. Our team works around your schedule to help find a time that is convenient for you.



Discovery and Recommendations PHASE TWO - WEEKS 3 - 4

Your advisor will now work with you to develop a personalized financial plan or investment strategy. That process starts with a Discovery Meeting, where your advisor will gather more information about:

- Your current financial situation, such as income, savings, and investments
- Your short-and long-term financial goals and how they fit into your broader vision for the future
- Your personal values, priorities, goals and non-negotiables
- Create a clear, unified view of your current financial situation
- Identify important factors to consider, such as recent or upcoming life transitions

This information forms a solid foundation that your advisor can use to offer initial financial recommendations. This can fall into multiple categories, including:

- **Financial Planning:** Develop a holistic financial plan that aligns with your values, lifestyle needs, and long-term goals
- **Investment Strategy:** Use our proprietary investment models and gain ongoing support to manage your portfolio
- **Retirement Planning:** Identify your retirement goals and build a financial plan to help fund the lifestyle and legacy you envision

WHAT YOU NEED TO KNOW

We Aim to Make Each Financial Plan:

Comprehensive

We are holistic financial planners. Our team factors your personal aspirations, values, and emotional needs into each plan.

Understandable

We avoid technical jargon. Our advisors strive to communicate in plain English and help you gain financial clarity.

Supported

We provide ongoing guidance and support. Our advisors meet with you regularly to evaluate and adjust your plan to reflect your changing needs.



Implementation and Onboarding PHASE THREE - WEEKS 5 - 6

Once your plan is agreed upon, we put it into action. That process involves a lot of “behind the scenes” work, from account transfers to implementing your investment strategy. Our team works to help make the process fast, simple, and smooth.

WHAT YOU NEED TO KNOW

Three Principles for Our Onboarding Process

<div style="background-color: #d9e1f2; padding: 10px; text-align: center; margin-bottom: 10px;"> <h4>Timeliness</h4> </div> <p>We work on your timeline. Our team strives to match your expectations and complete onboarding at the pace you request.</p>	<div style="background-color: #d9e1f2; padding: 10px; text-align: center; margin-bottom: 10px;"> <h4>Clarity</h4> </div> <p>We prioritize communication. Our team aims to answer your questions and provide updates as often as you need.</p>	<div style="background-color: #d9e1f2; padding: 10px; text-align: center; margin-bottom: 10px;"> <h4>Coordination</h4> </div> <p>We collaborate with your team. Our advisors work with your attorneys, accountants, and other professionals to integrate your financial plan.</p>
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Ongoing Support and Reviews

Your financial plan is unlikely to remain static. Goals change, priorities change, and risk tolerance evolves as you move through different stages of life.

That’s why we are committed to consistent engagement, responsiveness, and availability. Our advisors maintain regular contact through:

- Annual Reviews: We meet, update your financial plan, and modify your goals if applicable
- Quarterly Investment Updates: We help you understand your portfolio performance and explore opportunities to restructure your investments
- Monthly Insights and News: We provide commentary on market trends and offer ongoing education to help you build financial confidence

Visual Timeline



Transparent Planning Starts with a Single Conversation

Financial advice can feel overwhelming, and you might feel unsure whether the process is right for you. But we hope the process outlined above gives you the confidence required to take action—and begin planning for the future you deserve.



**Want to invest in your
financial future?**

Book Your Consultation

Over 97%

Of Marshall Financial Group clients agree that their advisor responds to their calls and emails in a timely manner.¹

Over 90%

Marshall Financial Group clients agree that their financial advisor meets or exceeds their expectations.²

Over 95%

Of Marshall Financial Group clients agree that their advisor is trustworthy and honest.³

¹ ** Based on Marshall Financial Group's March 2023 client survey

² ** Based on Marshall Financial Group's March 2023 client survey

³ ** Based on Marshall Financial Group's March 2023 client survey

The client satisfaction statistics shown above are based on a survey of 544 respondents conducted by Marshall Financial Group in March 2023. Participation in the survey was voluntary and clients were not compensated for their responses. The results may not be representative of the experience of all clients and are not a guarantee of future results or client satisfaction