Marshall Financial Group

Fee-only Financial Planning

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Personalized financial planning that starts with understanding you.

Get a jump on planning your future. What's important to you?

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Meet the Financial Planners

Why we're Fee-Only

Retirement Planning: Smart Ways to Start

Financial Advisors and Wealth Management

Marshall Financial Group assists clients under a "fiduciary" standard. That means everything we do for our clients must be in their best interest. (Yes, we're also amazed that all financial advisors don't have to hold to this basic standard.) That's why we offer fee-only advice.

A CERTIFIED FINANCIAL PLANNER™ Professional Who Really Listens

First, we spend time listening—really listening—to what you want from your life and wealth. We talk about your successes, your goals, and the things that keep you up at night. The plans we build with you will address all these issues and more. It's uniquely tailored to your life, family and vision.

Then your team, including a Certified Financial Planner™, will work closely with you to put the wheels in motion—and keep your plan fresh over time as your needs change. Regular updates and 24/7 online access to your accounts give you comfort and control.

Retirement Planning and Beyond

Wealth is complicated. Managing your money through the maze of taxes, insurances, and investments is only part of the story. The bigger challenges: ensuring you are ready for major life events like marriage, college, retirement, (financial independence or work optional) and succession—and are best prepared to live out your dreams whatever they may be.

Research-driven Portfolio Management

If you desire, we will also manage your investment portfolio, building it to achieve your goals now, and rebalancing it as needed to ensure it follows your agreed-on risk tolerance and growth targets.

Marshall Financial Group is based in Doylestown, PA, with clients around the Philadelphia region and across the nation. We look forward to meeting you very soon. Please click here to get started.

Financial confidence, control and freedom.
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