

## **Company Overview**

Marshall Financial Group is a progressive, community-oriented personal planning firm with high touch service. We help people live better lives today and create a future for personal success and significance. We are located in Doylestown, Pennsylvania in beautiful Bucks County, with convenient access to New York and Philadelphia. We are a fee-only independent Registered Investment Adviser registered with the SEC. As an Employee Stock Ownership Plan company, you are on the path to being an owner when you join our team.

## **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](mailto:hello@marshallfinancial.com).

Marshall Financial Group is an Equal Opportunity Employer.