

	<b>Response</b>
<b>Name of Firm</b>	Marshall Financial Group
<b>Contact info:</b>	Russ Weiss 215-348-9393 rweiss@marshallfinancial.com
<b>Website URL and/or NAPFA profile URL</b>	www.marshallfinancial.com
<b>How many employees?</b>	16 and 2 part time.
<b>Do you have account minimums?</b>	no
<b>If you charge hourly fees, what is your standard rate?</b>	We don't generally charge an hourly rate. We charge an annual fee for financial planning (separate from our AUM fees). If hourly rate is charge, I usually quote around \$300.
<b>If you charge AUM, how do you calculate fees?</b>	In arrears, quarterly, no charge on cash, Tiered billing
<b>What is the range of AUM percentage fees?</b>	, starts at 1% (\$0-\$250k and gets to .5% at \$1,000,000 and above – Negotiated at higher amounts (usually over \$2.5 million). Assumes financial planning engagement. If no financial planning engagement, add .25% to each tiered amount
<b>What software do you use to prepare financial plans?</b>	Moneyguide pro, excel, word, BNA tax software, Orion/Morningstar
<b>Where do you meet clients? Your office, their home, Web meeting?</b>	All are possible. Mostly at office and phone/web
<b>Do you accept clients outside Massachusetts?</b>	Yes
<b>How long have you been a CFP® professional?</b>	15 years. With my current employer since 2001. CFP obtained in 2003. Firm in business since 1970's

<p><b>Do you specialize? (divorce, retirement, seniors LGBTQ, etc</b></p>	<p>Personally, I specialize in non traditional households inclusive of Unmarried couples, blended families, International Households and LGBT. Most in the preretirement and retirement. Other advisors in firm specialize in Divorce, college planning, retirement, transition planning, emerging wealth. Have our own 4 person investment department with level 3 CFA (sitting for it this June) and CPA. Personally, I have extensive experience in Pre Retirement and Retirement planning as most of our clients fall in this range. I have Accredited Domestic Partner Advisor certification and currently enrolled in GGU Masters in advanced financial planning with concentration in Life planning (behavioral, psychology, coaching focus)..</p>
<p><b>Do you have any disciplinary history? Where can clients see it?</b></p>	<p>One incident and completely exonerated by FINRA/CFP – Provided copious notes on client case. CL wanted to buy gold in 2008, we recommended against it, he wrote back not realizing his comments were in form of written complaint. We submitted to compliance and I was found to have done everything right. I think its on FINRA since we were with broker dealer at the time (we were hybrid). Have been Fee only since 2012..</p>
<p><b>Where is your office located?</b></p>	<p>Doylestown PA</p> <p>I have several clients in MA/New Hampshire/New England area (plus great friend that lives in Brewster MA and anther in Providence..</p>
<p><b>What is the name of your Registered Investment Advisor?</b></p>	<p>Marshall Financial Group</p>

<b>What is the name of your Broker-Dealer, if applicable?</b>	NA, Schwab is our custodian.
<b>Would you offer a free introductory call (for clients who have questions)?</b>	Yes