

Media Release

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Contact:

Sophie Girgis

sgirgis@marketri.com

609-440-5222

Marshall Financial Group Recognizes William Marshall For 50 Years of Serving Clients and the Community

(DOYLESTOWN, Pa.) Employees and clients of Marshall Financial Group gathered to recognize and celebrate founder William Marshall's 50 years of business achievements, philanthropy and dedication to the community at a dinner held at Doylestown Country Club October 17.

Since 1968, Marshall has devoted his career to being a trusted advisor and wealth manager to generations of clients. He is credited with being one of the first wealth managers to champion the development of the Certified Financial Planner™ (CFP®) certification and in 1977, was one of the first 100 persons in the U.S. to achieve this certification.

In 1981, Marshall formed Wm. L. Marshall & Associates to offer financial planning services and in 1982 became registered as an investment advisor with the SEC. This Registered Investment Adviser (RIA) was later renamed The Marshall Financial Group, Inc. in 1991. In 2012, Marshall Financial transitioned to a fee-only model in its Financial Planning and Wealth Management practice, and in 2017, established a 100% Employee Stock Ownership Plan (ESOP).

William Marshall's commitment to the Bucks County community is evident in his longstanding service to the boards of organizations including:

- Doylestown Health Foundation
- Bucks County SPCA
- Central Bucks Family YMCA
- Ann Silverman Community Health Clinic
- International Association for Financial Planning (Philadelphia Area Chapter)
- Central Bucks Chamber of Commerce

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In addition to his service to a wide range of nonprofit organizations throughout his career, Marshall was honored by the Rotary Club of Doylestown in 2011 with the Four Way Test Award for Business, in recognition of his dedication to helping build the local community in dozens of ways, large and small.

As Marshall reflects on his 50 years in business and in service to the community, he notes that it's an experience he has enjoyed over and over, as clients he started serving in the 1980s have stepped down from their corporate roles to enjoy travel and time with their families, without financial cares or burdens. "There is nothing as rewarding," said Bill Marshall, "as having someone say to me, 'We are able to retire in comfort, and we would not have been able to do it without you.'"

About Marshall Financial Group

Marshall Financial Group is in the business of helping clients achieve financial wellbeing, so they can live their happiest, healthiest, and most productive lives. The firm provides a welcoming, non-judgmental environment and offers everything clients need under one local roof - a convenient, one-stop, financial planning and wealth management shop.

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Editor's Note: Photo Captions (photos courtesy of Devon Radkins):

Link to photos:

DSC_0007ABC: Sign welcoming guests at the celebration of William Marshall's 50 year of dedication and service to the community. Sign provided by Sweet Lou Designs.



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DSC_0018ABC: Celebratory cake provided by The Lucky Cupcake Company



DSC_0045ABC: President & COO Paula Nangle (left) and Chairman, CEO, & Founder Bill Marshall (right) attend the celebration in honor of Bill Marshall's 50-year career and service to the community.



Bill Marshall: Bill Marshall, Chairman, CEO, and Founder, Marshall Financial, celebrated 50 years of dedication and service to the community at a dinner held in his honor on October 17 at Doylestown Country Club.



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DSC_0035ABC.JPG: Don Scholz, Vice President & CIO Emeritus, Marshall Financial Group, and wife Joanna Scholz attend the celebration of Bill Marshall's 50 years of dedication and service to the community.



DSC_0042ABC.JPG: Allison Masoero, Marshall Financial Group CFP(R), and Adam Reinert, Marshall Financial Group Chief Investment Officer attend the celebration of Bill Marshall's 50-year career.

