



1847 Private Client Group

Marshall M. Shigon, JD

FINANCIAL ADVISOR

contact

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education

- Series 6, 63
- Life and Health Licensed
- B.S. Finance, University of Maryland
- J.D., Dickinson School of Law

areas of expertise

- Investment Management
- Retirement Income Planning
- Life Insurance Strategies
- Estate Planning
- Tax Planning for Investments

Registered Representative of, and Securities and Investment Advisory services offered through Hornor, Townsend & Kent, LLC (HTK). Registered Investment Advisor, Member FINRA/SIPC. 600 Dresher Rd., Horsham, PA 19044, USA. 800-873-7637, www.htk.com. HTK is a wholly-owned subsidiary of The Penn Mutual Life Insurance Company. 1847Financial is not affiliated with Hornor, Townsend & Kent, LLC. 3247418RB_Oct22

about

As a Financial Advisor with 1847Financial, Marshall works with his clients to create strategies that are effective in increasing income streams in retirement. He guides families and individuals to the realization that they have the power to succeed financially. He has over 25 years of experience as a financial advisor.

Marshall's approach to working with his clients is to start with blank slate and open mind. This way, the client can see all options objectively in order to find the best fit for their personal situation.

Marshall specializes in helping small business owners with employee and executive benefit design. He can advise on business succession planning, life, disability and long-term care insurance. He also has expertise in retirement planning, estate planning and 401(k) management. He is FINRA Series 6, 63 and 65 licensed.

Marshall currently resides in Blue Bell, PA. In his spare time, he enjoys spending time with his wife, Judy and their two daughters, Naomi and Ruthie.

professional experience

- Oscar, Schwartz and Associates (1990-1991)
- Prudential Financial Services (1992-2001)
- BIRE Financial Group (1992-2001)
- Creative Financial Group (2001-2013)
- BIRE Financial Services (2013-2017)

professional affiliations

- Home Builder's Association of Bucks and Montgomery County, 2005-2008
- Fort Washington Networking Professionals, 2015-2017
- Sponsor of the Merrill Reese Radio Show WIP, 2014-2017
- Associate Member of the Camden County Bar Association, 2014-2017
- Organizer of the NFL Draft Party with Brian Baldinger, 2017