

Ideas and insight into smarter retirement plans for owners, family members and preferred employees

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Meet the newest additions to MMG's Executive Team

Like all of you, we at MMG are always seeking the best talent to add to our firm. We try hard to match new talent to our culture, and we are committed to growing our firm. Our goal is to continue to meet the needs of our existing clients and also to strengthen our profile as the "go to" solution for those seeking help in customizing plan designs! Despite the difficult economic environment, MMG continues to grow and we are planning for the future! We appreciate the many referrals and introductions we receive from you, our clients, and view that as the highest compliment we can receive.

Who is Michael O'Connell?

Mike joins MMG as our Sales Director. Mike will be focused on working with our many referral partners (financial advisors, accountants, and other trusted advisors) to offer them support and explain how MMG can help them help their clients. Mike brings over 20 years of retirement and financial services industry experience with several of the nation's leading banks and insurance companies. He received his BA from the University of Richmond. Additionally, he holds professional designations from The American College and The College for Financial Planning. Mike lives in Princeton, NJ with his wife and daughter. When not working, Mike enjoys spending time on his sailboat or relaxing on the beach!

Who is Suzanne Pine?

Sue joins MMG as our Director of Finance and Administration. She works closely with Ian Haring, Esquire to coordinate all aspects of MMG's operations. While Sue's initial focus has been in the area of accounting, finance and administration, her 30 years of experience with professional service businesses is also helping us shape our client service interface. On a personal note, Sue's views her greatest accomplishment as raising her two successful, adult daughters. Sue is actively involved in strategic planning at St. Katherine's Church and is a staunch supporter of the fight against breast cancer.

We welcome your feedback!

We are always pleased to receive feedback and questions from our clients; we appreciate that so many of you return your client



satisfaction surveys! Mike and Sue as well as Bob, Ken, Lori and Ian are always happy to take your calls; please don't hesitate to contact us if you have questions or think there are other ways we could help you. We are business owners ourselves, and we understand how important it is to create a community of partners you can trust.

Call us at 215-222-5000, or email us at:

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Become a MMG Facebook Fan

The Team at MandMarblestone is excited to use social media as yet another venue to share information and reach our valued clients and friends. If you are already on Facebook, we encourage you to become a Fan by going to our Facebook page www.facebook.com/mandmarblestonegroup and clicking "Like" button in the header banner.

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