



Edward Marsi

Retirement Planning Specialist

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A holder of Series 7 and Series 63 securities licenses, Edward "Ed" Marsi is an experienced financial advisor who is pursuing a Chartered Retirement Planning Counselor designation at Colorado's College of Financial Planning. In his role as the senior financial consultant with a Manchester, New Hampshire-based branch, Edward Marsi assists families to plan appropriately for retirement and helps manages over \$350 million in assets for high net worth clients. He previously worked as a counselor in the firm's education department, where he helped clients design investment strategies to pay for college tuition, retirement and other investment goals. In over five years with the firm, he has earned multiple President's Club, Circle of Champions, and Guidance Awards.

Before entering the financial sector as a regional sales representative in 2011 with Onset Financial, Edward Marsi worked five years as a car salesman with Lyon-Waugh Auto Group, where he consistently achieved the highest level of customer satisfaction and maintained an average closing percentage of 45 percent. He also worked three years as a kitchen manager with 99 Restaurant. Ed Marsi earned a degree in culinary arts from Lynn Vocational Technical Institute, where he was a member of its basketball team, and studied business at Middlesex Community College.

EXPERIENCE

TD Ameritrade

Mar 1, 2012 - Present

Senior Financial Consultant

Onset Financial

Sep 1, 2011 - Mar 1, 2012

Regional Sales Representative

EDUCATION

College of Financial Planning

Nov 1, 2017 - Present

CRPC

Middlesex Community College

Sep 1, 1998 - Jan 1, 2000

Business Management