

**BROCHURE SUPPLEMENT**  
**ITEM 1: COVER SHEET**

Sheryl D. Parks

**The Marshall Financial Group LLC**

225 International Circle, Suite 102

Hunt Valley, MD 21030

(410) 563-0211

October 18, 2023

This Brochure Supplement provides information about Sheryl D. Parks that supplements The Marshall Financial Group LLC Brochure. You should have received a copy of that Brochure. Please contact Peter A. Marshall, Managing Member at (410) 563-1044 or pmarshall@marshallfinancialgroup.com if you did not receive The Marshall Financial Group LLC's Brochure or if you have any questions about the content of this supplement.

Additional information about Sheryl D. Parks is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). Ms. Parks' CRD number is 1227092.

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**ITEM 2: EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

Sheryl D. Parks was born in 1961.

**Educational Background**

<u>School Name</u>	<u>Degree</u>	<u>Year</u>	<u>Major(s)</u>
University Of Maryland	BS	1983	Chemistry
Loyola College	MSF	1984	Finance

**Employment Background**

Employment Dates: 5/2015 - Present  
Firm Name: The Marshall Financial Group LLC  
Type of Business: Investment Advisor  
Job Title & Duties: Investment Advisor Representative.

Employment Dates: 09/2020 - Present  
Firm Name: Purshe Kaplan Sterling  
Type of Business: Broker/Dealer  
Job Title & Duties: Registered Representative.

### **Employment Background (continued)**

Employment Dates: 9/1987 - Present  
Firm Name: Community College of Baltimore County  
Type of Business: Educational Institution  
Job Title & Duties: Professor of Management & Economics; Teaching.

Employment Dates: 3/2018 – 09/2020  
Firm Name: SSN Advisory, Inc.  
Type of Business: Investment Advisor  
Job Title & Duties: Investment Advisor Representative.

Employment Dates: 6/2015 – 09/2020  
Firm Name: Securities Service Network, LLC  
Type of Business: Broker/Dealer  
Job Title & Duties: Registered Representative.

### **Professional Designations**

Certified Financial Planner (CFP®) – 1987  
Chartered Financial Consultant (ChFC®) – 2001  
Certified Divorce Financial Analyst (CDFA®) - 2017

The CFP® designation is issued by the Certified Financial Planner Board of Standards, Inc. In order to receive a CFP® designation, the candidate must have a bachelor's degree or higher from an accredited college or university and have 3 years of full-time personal financial planning experience. In addition, the candidate must complete a CFP® board-registered program or hold one of the following: CPA, ChFC, Chartered Life Underwriter (CLU), CFA, Ph.D. in business or economics, Doctor of Business Administration or attorney's license. Once the designation is earned, the CFP® must complete 30 hours of continuing education every 2 years.

The Chartered Financial Consultant® ("ChFC") designation is issued by The American College. The prerequisites include: 1) 3 years of full-time business experience within the five years preceding the awarding of the designation; 2) completing 6 core and 2 elective courses; and 3) passing a final proctored exam for each course. Each individual must complete 30 continuing education credits every 2 years.

The CDFA® is issued by the Institute for Divorce Financial Analysts. The prerequisites include 1) 3 years of professional experience in finance or divorce, 2) a Bachelors degree, 3) completion of 4 courses with the IDFA and 4) successful completion of a comprehensive exam for each course. To retain the CDFA® designation, 15 divorce-related hours of continuing education must be completed every 2 years.

### **ITEM 3: DISCIPLINARY INFORMATION**

Registered investment advisors are required to disclose any material facts regarding any legal or disciplinary actions that would be material to your evaluation of each investment advisor representative providing investment advice to you. There is no information of this type to report.

### **ITEM 4: OTHER BUSINESS ACTIVITIES**

Ms. Parks is a registered representative of Purshe Kaplan Sterling (“PKS”). Client accounts will be opened at PKS and securities transactions will be executed through Mr. Parks in his capacity as a registered representative of PKS. No commissions are generated for securities transactions, but there is a ticket charge which generally does not exceed \$15 for trades. The ticket charge is paid to PKS, and Mr. Parks does not receive any portion of this fee. For mutual fund investments, Mr. Parks receives trailing commissions. Trailing commissions are fees the mutual fund pays to registered representatives each year that a client owns a particular mutual fund. If you decide to use PKS and Mr. Parks to implement any recommendations made, Mr. Parks receives commissions for those trades. Mr. Parks expects to spend approximately 25% of his time acting in the capacity of registered representative of PKS.

Ms. Parks is a Professor of Management & Economics at Community College of Baltimore County and expects to spend approximately 20% of her time acting in that capacity.

Ms. Parks is also affiliated with various insurance agencies. If you elect to implement insurance recommendations through Ms. Parks, she will receive the normal and customary commissions. You are under no obligation to implement insurance recommendations through Ms. Parks.

The receipt of commissions for selling insurance or securities products gives Ms. Parks an incentive to recommend investment products based on the compensation received, rather than on the client’s needs.

Ms. Parks works as a local leader at Second Saturday Divorce Workshops.

### **ITEM 5: ADDITIONAL COMPENSATION**

Ms. Parks does not receive any economic benefit from any non-client for providing advisory services, other than those listed in Item 4 above.

### **ITEM 6: SUPERVISION**

Peter A. Marshall, Managing Member, is responsible for the supervision of Ms. Parks. His telephone number is (410) 563-1044. Mr. Marshall adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm’s code of ethics and compliance manual. Ms. Parks adheres to all required regulations regarding the activities of an Investment Adviser Representative and follows all policies and procedures outlined in the firm’s policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements.

## **ITEM 7: REQUIREMENTS FOR STATE-REGISTERED ADVISORS**

Investment advisors who are registered with a state regulatory agency rather than the SEC are required to provide information about a wider range of disciplinary information than that described above. Ms. Parks has not filed for personal bankruptcy and has no disciplinary information to report.