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pg. 20



Marching in Step

The partners of the comprehensive wealth-planning firm **March Forward** share a simple yet profound goal: to help entrepreneurs and entrepreneurial-minded clients get to where they want to go.

Whether it's a string quartet or a rowing crew, there's something magical about groups of talented people engaged in acts of synchronous creation. The same can be said about business leaders whose collective efforts help build and sustain a successful enterprise.

The four financial professionals at the helm of March Forward, a comprehensive wealth-planning firm based in Conshohocken, appreciate the comparison.

March Forward specializes in private wealth management and business planning, yet the firm strives to provide informed guid-

ance for virtually every aspect of a client's financial life. Much like artistic or athletic pursuits rooted in collaboration, co-leading a firm as dynamic as March Forward requires a great deal of energy, creativity, and give-and-take. It also has the potential to yield extraordinary results.

The partners in March Forward—Marc J. Bernstein, JD, ChFC®, CAP®, CLU®, Kevin Crowley, Andrew R. Hauber, ChFC®, and Christopher Truscello, RICP®, CLF®—met over 20 years ago while working elsewhere in the financial-services sector. In 2022, they decided to combine their talents

and use their shared vision to build a business designed to grow, endure, and make a lasting difference in the lives of others. The firm has since grown to include fellow advisor Alex Deck, WMCP®. They have a dedicated support staff who diligently provide client service beyond expectation.

“For years I've been carrying around a picture of a string ensemble that describes synergy as the whole being greater than the sum of its parts,” Bernstein says. “That's what we have built here, a team of 10 of us who work together to achieve a common goal.”



Marc J. Bernstein



Kevin Crowley



Andrew R. Hauber



Christopher Truscello



Alex Deck

In Hauber's mind, shared leadership represents March Forward's greatest strength. The partners meet every Friday to discuss everything from big-picture growth opportunities to the precise details of clients' financial portfolios.

"We continually bounce ideas off each other and are always trying to take what we do one step further so we can grow alongside our clients," Hauber says. "Each of us has our own style and personality, but we make decisions as a team. The strongest results come from when everyone helps keep things moving."

While March Forward partners with clients from all walks of life, the firm focuses primarily on entrepreneurs, entrepreneurial-minded professionals, and corporate leaders.

"The majority of clients come from referrals," says Crowley, "and we're best positioned to guide people who need help managing the complexity of business and family dynamics."

"We want all our clients to see us as someone they can trust and accompany them on their journey, and be proactive about staying centric to their financial lives," Bernstein adds. "Our approach is 'process first, product last,' and we have a really good track record of giving people a map to help them reach their goals, whatever those goals may be."

The firm creates a "living, breathing document" known as the March Forward Action Plan, or MAP, for each client. Each plan is tailored to the individual and designed to adapt and evolve along with a client's life.

The advisors see themselves as "financial quarterbacks." Essentially, that means they take the lead in coordinating with other members of a client's financial team, such as accountants and attorneys, to coordinate everything from tax minimization to estate preservation.

No matter the client, every relationship begins with a conversation—a "blank slate," as Crowley describes it, in which the advisors

'Tell Me Your Story'

Each of the partners in March Forward enjoys listening to clients talk about where they came from and where they would like to go. It's no surprise that they would find a way to turn those stories into something tangible.

Through *Founders' Forum*, a podcast produced by WWDB AM 860, Marc Bernstein interviews the founders of American businesses about their lives and livelihoods. Each episode—nearly 170 as of press time—runs approximately 30 minutes long.

"The show is based on a first conversation I might have with a new potential client, where I say, 'Tell me your story,'" Bernstein says. "What kind of challenges have you faced? What are your greatest strengths? What lessons have you learned? What is your vision for the future? The guests really enjoy it, and the show has grown to the point that it has helped us attract new business."

Learn more about *Founders' Forum* by visiting www.foundersforumradio.com or wwdbam.com.

learn about the client's past, present, and future, as well as how March Forward can help them achieve their goals. The conversation is in-depth and ongoing.

"Rather than looking at each situation solely from a numbers perspective, we find out what's important to people, and figure out what makes them tick and why," Truscello adds. "Where do you see yourself in five, 10, or 20 years? Do you want to travel or relocate? Income planning is always a big part of that discussion, because we have to figure out where the money is going to come from before we can make those goals happen."

Hauber finds the implementation part of the planning process the most invigorating, in part because putting the strategy into practice often involves collaboration with his fellow partners, each of whom brings a unique perspective and complementary strengths to the conversation.

"Every client has a unique situation, so there is no silver bullet to help them achieve their goal," Hauber says. "My favorite part of what I do is when someone gets excited about implementing our recommendations and then helping them get to the finish line."

Of course, not every client is a good

match with March Forward. Mindset and attitude are just as important as money in the bank.

"We like to work with people who are interested in growing and moving forward," Bernstein says. "If our clients have something in common, it's that they tend to be forward-looking. Even if they have stopped working, they still have entrepreneurial instincts. They don't want to retire in the traditional sense."

Planning for the future often extends beyond a client's lifetime. Many of the firm's clients are focused on issues of legacy, according to Truscello. March Forward can help them clarify and execute upon those wishes, too.

"People want to have made an impact while they were here," Truscello says. "For some, it can be overwhelming to think about a time when they're no longer here, but we try to make the complexity simple to help them achieve their goals and protect their family and what they have built."

As the partners look to the future, they see continued growth on the horizon: an expanded advisory team, additional staff, more clients, and significantly more assets under management. In fact, they expect their assets under management to exceed \$1 billion within the next few years.

"This is a full partnership, and we're all aligned in the way we do business; that's central to who we are," Bernstein says. "I love what we're doing here. It's dynamic, it's creative, and we get to help other creators who are helping build the fabric of our country." ■

March Forward

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