Ira B. Marshall, RIA

Registered Investment Advisor
Continuing Education Provider
Platform Speaker

2150 Lilac Lane, Morgan Hill CA 95037
408-779-4049 • ira@iramarshall.com • www.iramarshall.com

Ira B. Marshall currently maintains an active financial, estate, and investment advisory practice as a Registered Investment Advisor (RIA) based in Morgan Hill, California. Ira recognized the need to combine the essentials in foundation goal mapping with the process of engaging in financial and estate planning. In that effort individuals, families, business owners, professionals and executives alike could realize, in their own lifetime, unlimited financial and personal growth, success and achievement.

Mr. Marshall's experiences and travels throughout America and abroad have provided him with invaluable insight into the understanding of the human dynamics and inter-relationships between survival, ambition, success and achievement.

Ira is dedicated to inspire and motivate his clients to participate in the implementation and realization of their own financial and life planning goals through consultations, workshops, seminars, lectures, and educational learning retreats.

EDUCATIONAL BACKGROUND

Ira received his undergraduate education at Northwestern University, Evanston, Illinois, earning his Bachelor of Philosophy Degree (PhB) majoring in Political Science/International Relations in 1971. He then went on to receive his legal education by attending the University of Melbourne, Law School in Melbourne, Victoria, Australia.

LICENSES, CREDENTIALS, AND CERTIFICATIONS

Life and Disability License State of California Department of Insurance; Series 2 Securities License; Registered Investment Advisor (RIA); State of California Department of Business Oversight; Financial Planning Association (FPA); National Association of Insurance and Financial Advisors (NAIFA).

CONTINUING EDUCATION CERTIFICATIONS

Currently or in previous years Ira has also been a provider for the California State Bar, the National Association of State Boards of Accountancy (NASBA) / National Registry of CPE Sponsors to offer approved CPE credits, and the International Board of Standards and Practices for Certified Financial Planners (IBCFP); the California Department of Real Estate; and State of California Department of Insurance (Continuing Education Provider).

AWARDS, RECOGNITIONS & ACCOMPLISHMENTS

Mr. Marshall has received numerous academic and professional honors including **Northwestern University's Class of 66 Scholarship**; nominated to Who's Who in Finance and Industry; Community Leaders of America; and International Who's Who of Intellectuals.

- **Eagle Scout**, Explorer Post 156, Liverpool, NY 1963

- Created and team taught a course entitled: **Global Life and Mankind** under the faculty direction of Law and Political Science Professor, Anthony D'Amato, Northwestern University, Evanston, Illinois, 1971

- Founded and became President of the **Environmental Law Society**, University of Melbourne, Law School, Melbourne, Victoria, Australia 1972.

- Guest speaker to the **ANZALS Conference** between Australia and New Zealand law students, Perth, Australia 1972. Legal Education and Social Responsibility, A Case Study in Teaching An Environmental Law Course (Expanding The Legal Curriculum)

- Founded and incorporated **The International Common Law Exchange Society (ICLES)** a non-profit organization dedicated to the exchange of law between nations.

- Sponsored **The First International Colloquium On Legal Aid and Delivery of Legal Services** London, England ©1976 by The International Common Law Exchange Society. All rights reserved.

- **Agency of the Year** John Alden Life Insurance Company, for outstanding production for 1986 National Award.

- **Award of Excellence** John Alden Life Insurance Company, 1989 National Award.

- John Alden Life Insurance Company **Top Manager**, London England 1987

- **Resolution of Commendation** from Congresswoman Zoe Lofgren, honored and recognized for dedication to the care of veterans and contributions to the veterans' community-at-large. 2009

COURSES, LECTURES AND WORKSHOPS

- *Insurance Planning for the 90's (Commissions vs. Fees)* 1992, presented to Northern California Financial Planning Conference, San Francisco, CA.
- *Executive Bonus Tax Planning, Under The Corporate Umbrella, How To Put The Bonus Back In The Bonus Plan,* copyright 1993
- *Understanding the Doctrine of Reasonable Compensation, and Its Use and Application in a 162 Executive Bonus Plan, 1993* IAFP Southern California Financial Planning Conference, Palm Desert. CA.
- *How To Become and Remain a Financial Success,* workshop and tape, copyright 1993 updated 2013.

- *Goal Mapping Your Way to Personal Success and Achievement, The Power of Mastering Change and Fostering Innovation in the Work Place*, copyright 1994
- *Comprehensive Review of Low-Load/No-Load Insurance Contracts*, copyright 1994
- Achieving Effortless Energy in the Goal Mapping Process…A life management and personal success program copyright 1997
- Success and Achievement Showcase, copyright 2010, revised copyright 2013
- *Embracing Effortless Energy in the Goal Mapping Process*, copyright 2013.
- *The Importance of Comprehensive Financial, Estate and Investment Planning*, copyright 1993 revised 2013
- *How to Become and Remain a Financial Success* – revised, copyright 2013

ARTICLES AND PUBLICATIONS

- *Notions, Thoughts, and Essays on Man*, Unpublished paper, Northwestern University 1970.
- *Some Scientific and Legal Implications of Environmental Degradation*, University of Melbourne, Australia.
- *The Environmental Crisis,* Summons Magazine, 1972, University of Melbourne, Law School, Melbourne, Australia.
- *Legal Education and Social Responsibility, A Case Study in Teaching An Environmental Law Course (Expanding The Legal Curriculum),* copyright 1972 (ANZALS Conference, 1972, Perth, Australia)
- Founded, published, and was editor-in-chief of periodicals entitled: *The Common Law Lawyer;* and *Transnational Immigration Law Reporter (TILR)*
- *Disclosure and Due Diligence in Life Insurance Planni*ng, copyright 1993
- *Insurance planning in the 90's, Commissions vs. Fees*, copyright 1993
- *Understanding the Doctrine of Reasonable Compensation*, copyright 1993
- *Achieving Effortless Energy in the Goal Mapping Process*, copyright 1993
- *Something for Nothing is Not Enough*, copyright 1993
- *Risks, Challenges and Rewards of the Financial Planning Process*, copyright 1993
- *Value and Use of the Durable Power of Attorney* copyright 1996

Today Ira Marshall offers comprehensive financial, estate and investment advisory planning to a diverse and affluent clientele. His main commitment is to assist his clients in defining their goals, establishing a plan of action and assisting them in achieving their highest level of success.

Perhaps the most influential and valuable tool in Ira Marshall's skill building arsenal is his all day goal mapping workshop entitled: *Success and Achievement Showcase*. Attendees are equipped to set a life long course towards achieving their goals and objectives through a new architecture for thinking, planning and achieving.

NORTHWESTERN UNIVERSITY

THE TRADITION CONTINUES. . .

About Your Instructor
Ira B. Marshall

- Bachelor of Philosophy, PhB. 1971
- Political Science/ International Relations
- Participated in Northwestern University Percussion Symposium 1969, Received Group instruction with Jazz percussion Greats such as Roy Haynes, Al Dawson, Joe Morello, and Gary Burton
- Ira was enrolled in The Evanston (Day) Division as well as the Chicago (Evening) Division
- He created and Team taught a course as a senior entitled: ***Global Life of Man Kind*** under the faculty direction of Law and Political Science Professor, Anthony D’Amato.
- As a senior Ira was awarded the Class of 66 scholarship due to his outstanding scholastic achievements while an undergraduate student at Northwestern University