

Form Name:  
Submission Time:

Citizens Commission  
March 12, 2019 5:19 pm

**Name** Joseph P. Marsden Jr.

**Address**

**Phone**

**Email**

**Citizenship Affirmation** I am a U.S. Citizen

**Residency Affirmation** I am a resident of the Commonwealth of Massachusetts

**Statement of Intent** I intend to comply with and advance the policy established by this Act.

**Statement of Interest**

As an attorney, I believe in the ideal that people are best positioned for self government when given all the relevant and accurate information available to make well reasoned decisions. Disagreements are a natural by-product of this process. What cannot be a by-product, is information that is not only incorrect, but also bought and paid for by special interests who have a vested interest in tipping the scales of information in their favor.

In this age of increasingly blurry lines as to the source of content and data, the flow of money and its potential as a corrupting influence on elections, and the information on which Americans base their electoral decisions, it is critical that those decisions be based on a set of facts and figures that have not been bought and sold in an effort to obfuscate the true intent and source of their origin.

By limiting the impact and influence of concentrated money and artificial entities on elections, we as Americans can trust that the information that we base our decisions on as to policy and leadership will be free of undue influence both foreign and domestic, and thus ensure the continuation of an America evermore committed to the ideals as original envisioned by our Founding Fathers now and in the future .

**Résumé or Summary of Qualifications Upload**

[https://s3.amazonaws.com/files.formstack.com/uploads/3282862/71887710/485355775/71887710\\_resume.doc](https://s3.amazonaws.com/files.formstack.com/uploads/3282862/71887710/485355775/71887710_resume.doc)

**Political Party Affiliation, if any, over the previous five years** Unenrolled

**City or Town where you reside** HOLLISTON

**Employment Status**                      Employed

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**Occupation**                              Attorney

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**Employer**                                 Self

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## Joseph P. Marsden Jr., Esq.



### Experience:

**Marsden Law P.C.**

*Present*

**Holliston, MA**

*Estate Planning/Elder Law*

### Responsibilities

- Meet with clients, review estate planning goals and objectives, and prepare and draft estate documents
- Work with clients who are considering applying for MassHealth/Medicaid, review the rules and regulations, re-position assets where appropriate, and file the MassHealth application as well as follow the application process until it is approved
- Handle all appeals and information requests related to the MassHealth application based on MassHealth caseworker feedback
- Handle probate of deceased clients, and work with families to avoid probate where possible in line with client objectives

**Solares Hill Advisors**

*Present*

**Holliston, MA**

*Financial Planner/Investment Advisor*

### Responsibilities

- Provide financial planning advice and guidance to clients based on investment goals and objectives
- Discuss appropriate asset allocation strategy based on client risk tolerance, time frame, and withdrawal rate
- Review retirement income goals and retirement strategy and recommend solutions to clients using various investment products that are in line with client objectives
- Review and discuss private placement investment opportunities where appropriate and review risk and reward of such investments and impact on portfolio

**Gosselin and Associates**  
**Winchester, MA**  
*Elder Law/Estate Planning Attorney*

*March 2009-July 2010*

Responsibilities:

- Meet with potential clients, review "Law for Life" philosophy, and discuss areas of exposure for estate planning, probate, Medicaid, and long term care planning
- Draft estate planning or long term care planning documents and work with family to implement the plan and modify plan as situation or health changes
- Meet with clients post plan to incorporate any post mortem planning needs that require attention
- Coordinate Medicaid planning, file the application with MassHealth and handle any appeals or information requests from MassHealth
- Review and coordinate the use of other potential sources of assistance with clients (i.e. Community Medicaid programs, PACE, Veterans Aid and Attendance program)
- Business Development: meet with potential referral sources, discuss our services, and work with referral sources to insure seamless client experience when referring client

**Falco and Associates/Senior Resource Center**  
**Quincy, MA**

*September 2007-March 2009*

*Elder Law Attorney*

Responsibilities:

- Meet with clients and review areas of exposure for estate planning, probate, Medicaid, and long term care planning
- Draft documents and implement plan with client and client's family
- Develop and incorporate a care plan in conjunction with the estate plan, and the clients and family's goals and objectives
- Monitor plans and make changes as needed based on changing client health or financial situation
- Business Development: meet with potential referral sources, discuss our services, and work with referral sources to insure seamless client experience when referring client

**Fidelity Investments Boston, MA**

*October 2004- September 2007*

*VP/Senior Account Executive-Private Access*

Responsibilities:

- Develop existing client relationships to retain and increase total assets, revenues and profitability
- Pro-actively build long term relationships with all assigned client households
- Retain and develop assigned account relationships with Fidelity currently valued at \$1 billion
- Build a book of business, market share, and share of wallet by acquiring new clients, community outreach and referrals
- Understanding of clients' overall financial goals and objectives, and be able to present all Fidelity products and services when appropriate.
- Effectively create the best possible customer experience and meet the clients' broad range of investment needs.
- Leverage local branch Relationship Manager and phone service team to increase client's understanding of the benefits and usage of the service model
- Leveraging the expertise of the Fidelity organization including key product and service groups in face to face interactions with HNW clients
- Understanding of the client's overall financial goals and objectives and the ability to present the broad range of Fidelity HNW products and services.
- Measurements include: Revenue/Expense/Profitability, Retention, Customer satisfaction & loyalty, asset growth and household acquisition
- Knowledge of trust and estate planning, income planning, insurance and the planning solutions from the simple to very complex

*Portfolio Advisory Services*

*January 1994-October 2004*

Responsibilities:

- Develop and maintain relationships by acting as a liaison between Fidelity's financial representatives, investment and legal staff, prospects, trust officers, and clients. (Fidelity Portfolio Advisory Services offers discretionary investment management, trust services, and estate planning solutions to Fidelity's high net worth prospects and clients)
- Work closely with the investment staff and trust administration on positioning Fidelity as the corporate trustee solution for both current and successor trustee business and to determine the most appropriate investment allocation for prospects, trustees, and clients
- Communicate Fidelity's assessment of market conditions and its rationale for investment selections and allocations with prospects, trustees, and clients
- Devise strategies that help reduce both current and future estate taxes and allow for post-mortem control by clients and trustees
- Conduct seminars and provide support to Fidelity's branch representatives to enable them to more effectively present and qualify prospects for Portfolio Advisory Services, Personal Trust Services and other high net worth Fidelity products.
- Cross-sell other Fidelity services which results in additional revenues and further binds clients to Fidelity

*Mutual Fund Sales Representative*

*January 1993-January 1994*

Responsibilities:

- Identified and matched customers needs with appropriate Fidelity products, and assisted with trading, market updates, performance, and general mutual fund information
- Discussed various investment options with customers based on Fidelity's "needs based selling" approach, and assisted in the development of their portfolio
- Monitored individual performance on a monthly basis to track progress and results, while adjusting sales activity as needed
- Worked on a rotating basis in the Investor Centers to help develop and enhance presentation skills and improve customer interaction

*Mutual Fund Service Representative*

*January 1992-December 1992*

Responsibilities:

- Assisted inbound customers with questions and service issues concerning their existing accounts
- Tracked customer problems through on-line computer system to insure correct and timely resolution
- Worked closely with upper management in various programs to help develop alternative mutual fund policies and procedures

**Licenses:** Series 7, 6, 63, and 65

**Education:**

**Suffolk University Law School**, Boston, MA

Juris Doctor May 2002

Activities: National Moot Court Securities Trial Team: March 2000

Elder Law Clinic

**University Of Massachusetts at Amherst**, Amherst, MA

Bachelor of Arts, February 1991

Major: Economics Minor: History