



Marco Melero

For Marco Melero, financial competence is all about cultural relevance. A culturally relevant experience means more than just sharing a language, it is effective communication.

Marco already has a natural understanding of the differences in Hispanic cultures, a nuance he taps into when speaking to his diverse clientele. Born in Chicago, with 1st generation parents who came from Mexico, he quickly learned that “saving money” meant hiding it “under the mattress,” an example he uses when speaking to someone of Mexican descent. Marco switches gears when speaking to those of Columbian descent, using a “coffee can” example as a savings method to better relate and assist with retirement planning. This cultural sensitivity builds stronger relationships and offers him more opportunities to help his clients.

“I think there needs to be more financial literacy in the community to combat the common misconception that Hispanic people have no savings because there are great retirement vehicles out there that everyone can take advantage of,” said Marco. “When there is no longer a communication barrier, you can more easily explain the appropriate retirement alternatives that will work for them and their families.” Marco has extensive knowledge in fiduciary guidance, investment due diligence, retirement plan design consulting and participant education. When he decided to return to being an investment advisor Marco studied the way hundreds of advisors work and determined that the most successful advisors work in teams.

“There is a strong Hispanic demographic here in Dallas and nationwide. That’s steadily growing. I’m excited to serve my community with the help of Qualified Plan Advisors’ (QPA) team approach, but also support all of our clients across the country. I love the idea of being able to call on experts from all areas of the financial services business to ultimately build success for our clients.”

Prior to joining QPA in 2017, Marco was with Principal Financial Group, where he served as a bicultural relationship manager.

Marco earned his Bachelor of Science in business finance from the University of North Texas. He holds the FINRA Series 7 and 66 registrations.