

Falcon Wealth Planning Promotes New Chief Operating Officer

Ray Bartolome named as New Chief Operating Officer at Falcon Wealth Planning

ONTARIO, CA, UNITED STATES, November 1, 2021 /EINPresswire.com/ -- The month of October has been an exciting whirlwind for [Falcon Wealth Planning, Inc.](#) Amidst staggering company growth and moving to a bigger and better location, Falcon Wealth has appointed their Director of Operations, Ray Bartolome, as the new Chief Operating Officer. "I am excited and humbled for the new role I've been given at Falcon Wealth Planning," Ray says. "As Chief Operating Officer, I will use the 20+ years of experience I've gained in operational efficiency management and individual development alongside my passion to take on big challenges to help Falcon Wealth Planning maintain its strong vision-driven purpose."

Through all of the changes that Falcon Wealth Planning has experienced in the past few months, Ray has been at the forefront of the action. It's a position that Falcon Wealth Planning's Principal, Gabriel Shahin, has not overlooked. "Ray in a short period of time has become such an asset to our organization and an integral part of our scaling efforts. His futuristic mindset allows us to stay one step ahead to avoid any bottleneck growing pains."

Gabriel has no hesitations about Ray stepping into the new position, "He is an excellent leader and always a glass-half-full individual. His energy and passion are second to none and filled the



Ray Bartolome, Chief Operating Officer





His energy and passion are second to none and filled the COO role without a formal title. He is a big part of our continued success and with his help, \$1 billion is imminent.”

*Gabriel Shahin, CFP®, MBA,
AIF®*

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During Ray’s tenure at Falcon Wealth, he’s seen nothing that would show him that that \$1 billion milestone isn’t inevitable. “Over the last 8 months, I’ve personally seen the strength of Falcon Wealth Planning through the eyes of the associates,” Ray comments. “They are giving their best because our clients not only deserve it but because it’s the right thing to do. This is what motivates me as I step into the role and help shape Falcon Wealth Planning into

accomplishing even greater goals.”

About Falcon Wealth Planning

Falcon Wealth Planning, Inc. is a full-service Financial Planning firm that is designed to help clients achieve their financial goals while controlling their taxes, fees, and the risk they take non their investments. We specialize in comprehensive financial planning. We are a FEE ONLY Registered Investment Advisor that specializes in tax-efficient retirement income and helping our clients achieve their financial goals.

Gabriel Shahin
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