

Falcon Wealth Planning Adds New Managing Director

Kevin Mayo CFP®, MBA promoted to Managing Director of Falcon Wealth's Ontario Headquarters

ONTARIO, CALIFORNIA, USA, November 15, 2021 /EINPresswire.com/ -- [Falcon Wealth Planning, Inc.](#) is one of the fastest-growing Registered Investment Advisory firms in the nation and there's no plan to slow down by promoting Kevin Mayo CFP®, MBA to lead Falcon Wealth's Ontario Offices as its Managing Director. Kevin brings 20+ years of experience in Financial Planning and has proven himself to be an impeccable leader within the firm. "We are excited to have Kevin take additional management roles in this company," says Gabriel Shahin, CFP®, Principal of Falcon Wealth Planning. "His skills and management experience will help our advisory team grow and offer superb service to our clients."

Kevin has been a staple at Falcon Wealth for nearly two years but he expects to do much more with his new role. "I'm excited for the opportunity that my new role at Falcon Wealth Planning will provide me. As Managing Director, I'll be able to share decades of experience in sales management, recruitment, and associate development."



Kevin Mayo CFP®, MBA

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His years in upper management are a strong asset for our company and the goals we are looking to achieve.”

*Gabriel Shahin, CFP®, MBA,
AIF®*

Falcon Wealth has experienced nearly 50% in assets under management growth since the beginning of the year and Gabriel is hopeful that Kevin's past experience will help keep the firm on course for their end-of-the-quarter goal of managing half a billion dollars. "With Kevin taking on the Managing Director role, this will help leverage management and allow Falcon to continue its growth plan. His years in upper management is a strong asset for our company and the goals we are looking to achieve," says Gabriel.

Reaching that goal would be a fantastic prospect but it's not all that Kevin will be focusing on while taking on his new role. "Building a culture of professionalism focused on meeting the needs of our clients has been a rewarding experience over the last two years," Kevin says, "and I look forward to creating a shared vision with the management team at Falcon Wealth Planning. I hope to impact the lives of our associates and deliver unparalleled service to all the clients of the Falcon Family."



About Falcon Wealth Planning

Falcon Wealth Planning 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 on 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.

Falcon Wealth

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