

Falcon Wealth Planning establishes Managing Director, David Smith CFP®, Ph.D. in Chicago

With a CFP®, Ph.D. designation, David Smith will readily help clients in Falcon's newly established offices in the Chicago area.

ONTARIO, CA, USA, September 12, 2022

/EINPresswire.com/ -- [Falcon Wealth Planning](#) is excited to announce that David Smith, CFP®, Ph.D., will join the Falcon Wealth team as our newest Financial Advisor. David started his second career as a CFP® with a plan to be a straightforward advisor who takes a personal approach to educating and assist his clients in making the best financial decisions possible. As a Financial Advisor at Falcon Wealth Planning, David will work directly with clients to help customize their personal financial goals and set a course to achieve them.

"I'm looking forward to creating a hub in the new Chicago offices and hope to be the first of many new Falcon advisors in the area," David said. "I

hope to build an office space where people know they can access true fiduciary advice regarding their finances. From saving for college to creating a great retirement plan, I hope to see more people enjoying their lives because of our help." David will be working alongside the President of Falcon Wealth Planning, Gabriel Shahin CFP®, MBA, AIF®, as well as the Managing Director of our



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Irvine offices, Michael Jensen CFP®. Both Gabriel and Michael are enthusiastic about David's future at Falcon and believe that his dedication and experience, it will allow the company to expand smoothly into the Midwest. "David is so dedicated to his work, I think that he will help the company reach a national network of clients," stated Gabriel.

With this further expansion into Chicago, Falcon is well

underway to potentially surpassing half a billion dollars in Assets Under Management by the end of this year. David also sees the considerable growth for Falcon, stating, "Falcon had the most exciting growth potential out of all of the companies I considered working for. I am sure we will do big things as we continue to grow our outreach nationally."

About Falcon Wealth Planning

Falcon Wealth Planning is a full-service Financial Planning Firm 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 specializing in tax-efficient retirement income and helping our clients achieve their financial goals.

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