

Falcon Wealth Planning Acquires Rivermark Wealth Management in San Jose

Falcon's Expansion Continues Through Partnership with Ron Guay CFP®, Principal of Rivermark.

ONTARIO, CALIFORNIA, USA, March 6, 2023 /EINPresswire.com/ -- [Falcon Wealth Planning](#) has started 2023 strong by ringing in the new year with over half a billion dollars in asset management. The winning streak continues through the acquisition of San Jose-based Rivermark Wealth Management. The partnership solidifies Falcon's presence in the Bay Area and fortifies the foundation of potentially expanding further into the Northwest.

Ron Guay, CFP® EA and Principal of Rivermark Wealth Management established the company after making a pivot into personal finance and tax planning after joining the industry in corporate finance. He brings with him a book of over 100 financial planning clients. "What I've learned on the journey in finance, both corporate and consumer, is my success has been my ability to help clients connect their spreadsheets to their stories." The partnership began talks in early 2022 to ensure that Rivermark's values aligned with those of Falcon.

Gabriel Shahin CFP®

His commitment to serving his community by helping expand their financial literacy and tackling complex tax profiles falls in line with Falcon's work ethic and mission statement."

When asked why Ron choose Falcon for this partnership, he stated, "I chose Falcon because their process of delivering financial advice through education and empowerment aligns with my values and approach as an advisor. Serving all clients on a fiduciary basis, taking the time to really understand each client's unique needs and priorities, and providing first-class tax and financial advice is a formula for making a positive impact and



Gabriel Shahin, CFP®, Ron Guay CFP®, EA, and Michael Jensen CFP®

something I'm excited to help the firm bring to the Bay Area."

Michael Jensen CFP®, Managing Partner, has spearheaded Falcon's expansion into the San Francisco Bay Area and sees the partnership as the perfect opportunity to further establish Falcon Wealth in the San Jose community. "Ron's experience working extensively with the Tech industry brings planning expertise for advising on equity compensation and stock option plans. Rivermark is trusted and recognizable in Silicon Valley and our goal is to have the community equate that to Falcon Wealth."



Falcon's Principal, Gabriel Shahin CFP®, is excited to begin this partnership. "We're always looking for A-Players and we found that with Ron and Rivermark. He brings expertise in tax and financial planning and has an established reputation with high-income professionals. His commitment to serving his community by helping expand their financial literacy and tackling complex tax profiles falls in line with Falcon's work ethic and mission statement. We're glad to have brought on an advisor like him."

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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