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CORONA, CALIFORNIA, USA, March 29, 2023 /EINPresswire.com/ -- Financial Planning Powerhouse Corona-Based Advisor Bob Chitrathorn Rose from Obscurity to Lead a Major Inland Wealth Management Firm Focused on Building Client Success

When individuals, families and businesses seek wealth management and financial advising in the Inland Empire, Orange County, Los Angeles County and beyond, they turn to Wealth Planning By Bob Chitrathorn, CFO of Simplified Wealth Management, a Corona-based practice offering individualized financial guidance throughout the lifecycle.

Chitrathorn's areas of experience are vast, including insurance planning (Medicare, critical and chronic health insurance, life insurance, and even pet insurance); investment planning for college, retirement and legacy; savings strategies; budgeting; and referrals for trust and estate planning, home loans and solutions for daily and monthly expenses.

"I love to educate and teach concepts that are easy to use and apply but make a huge difference when put into practice," says Chitrathorn. "I try to do what I can to help all my clients become more efficient at their current state and then teach them how to get into a better position in time."

Whether C-suite executives or business owners, professionals across many industries, government employees or lower-income workers, Chitrathorn's clients come away with a better understanding of personal finances and the tools available to reach higher.

Getting Started and Growing With Simplified Wealth Management


Bob Chitrathorn

New clients first meet Chitrathorn for a complimentary consultation, in keeping with the Simplified Wealth Management pledge to not charge fees unless clients receive tangible benefits.

A particular focus for Chitrathorn and Simplified Wealth Management is retirement planning. In today's economy, with the future of Social Security in doubt and private retirement plans in greater focus, it is never too early to prepare for your golden years.

*"The time value of money is the technical term for how money grows and compounds over time," explains Chitrathorn. "It can take 30 years for $200 per month at 8% interest to turn into $298,000, but add just five more years to it, and the out-of-pocket is only $12,000 more, but the total value is $458,000. Add another five years, and the value amounts to $700,000! Everyone should be able to have at least $700,000 by the time they retire, but many people don't because no one showed them how it can be done."

An Immigrant Work Ethic Pursuing the American Dream Powers Simplified Wealth Management

Like many younger financial professionals, Chitrathorn's interest and acumen in personal finances came not from an upbringing of luxury, but from the enterprising necessity that comes with growing up amidst financial hardship and sacrifice.

Chitrathorn is the son of Thai immigrants who came to Michigan in 1974 before relocating to California, in the hopes of finding a better life and freedom in the United States.

"My mom went to nursing school and pushed the American dream journey that we always hear about," explains Chitrathorn. "She and my dad, a factory worker, love their native Thailand, but my parents were determined. They worked hard to give me and my sister a good education in private school. Despite a language barrier, they worked hard with great dedication each day."

Despite growing up in a mobile home park in Colton and having little materially, Chitrathorn was always infused with a powerful and versatile work ethic and entrepreneurial mind, a passion he brings to bear today with each and every client he serves.

"I had to buy my schoolbooks in high school, so I offered my classmates to sell me their books in exchange for more money than any bookstore would give them," he recalls. "Year after year, my buddy and I would sell books that way, providing the funding to put us through school and get the materials we needed."

Nearly Two Decades of Success and Leadership Advising the Inland Empire

Chitrathorn graduated from Cal State San Bernardino in 2004 with two B.S. degrees in finance and real estate and a minor in business administration and graduated magna cum laude, with membership in the Golden Key Honor Society.

"I love finance to this day and plan to stay in this career path forever because helping people is a great feeling," he says.

Since 2004, Chitrathorn has been a committed and conscientious financial advisor, first serving as vice president of wealth planning for Trilogy Financial before working for nearly five years as vice president of wealth planning for Providence Wealth Planning. In June 2021, he joined recently established Simplified Wealth Management to help grow a new brand and shape the next generation of financial advisors.

Chitrathorn's advice has a global reach beyond his Inland Empire practice. In 2016, Brian Tracy's book, Success Manifesto: The World's Leading Entrepreneurs and Professionals Reveal Their Secrets to Mastering Health, Wealth and Lifestyle included a chapter by Chitrathorn, a testament to his growing reach and experience and an opportunity to share his love for financial planning and his clients.

Chitrathorn holds the Series 6, Series 7 and Series 63 registrations with LPL Financial, Series 65 registration with Strategic Wealth Advisors Group LLC, along with life, health and long-term care insurance licenses.

The Riverside resident lives with his wife of 10 years, Brittany and their rescue dog, Mazy. The couple are avid football fans and enjoy watching Sunday night football!

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https://www.facebook.com/planwithbob
https://www.youtube.com/@WealthPlanningbyBobChitrathorn

*This is a hypothetical example and is not representative of any specific investment. Your results may vary. All investing involves risk including loss or principal. No strategy assures success or protects against loss.

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