

Falcon Wealth Planning Surpasses \$1 Billion in Assets Under Management

ONTARIO, CA, USA, July 16, 2024 /EINPresswire.com/ -- [Falcon Wealth Planning](#), a premier financial planning firm, proudly announces a monumental achievement: surpassing \$1 billion in Assets Under Management (AUM). This milestone marks a significant moment in the firm's history, showcasing its continued growth and unwavering dedication to providing exceptional financial planning services.

Over the past year, Falcon Wealth Planning has experienced an impressive surge in AUM, growing from \$825 million at the start of the year to over \$1 billion. This remarkable growth underscores the firm's commitment to its clients and ability to deliver outstanding financial outcomes.



3400 Inland Empire Boulevard Suite 100, Ontario, CA 91764

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This milestone is not just a number; it represents [our] collective effort, passion, and teamwork...”

Gabriel Shahin, President and Founder

Gabriel Shahin, CEO and Founder of Falcon Wealth Planning expressed his excitement to his team: "I am overjoyed to express my deepest gratitude to each and every one of you for the remarkable achievement of reaching the \$1 Billion milestone. This milestone is not just a number; it represents the collective effort, passion, and teamwork that each one of you has contributed. Your resilience in the face of challenges, your innovative ideas, and your relentless pursuit of excellence have truly set a

new standard for our organization."

Falcon Wealth Planning's journey to this milestone has been marked by a series of strategic initiatives and client-focused services that have set the firm apart in the competitive financial planning industry. The firm's holistic approach to wealth management and personalized financial strategies have been key drivers of its success.

As Falcon Wealth Planning celebrates this achievement, the firm remains focused on its mission to provide fiduciary, fee-only financial planning services. The team is committed to continuing its legacy of excellence and helping clients navigate their financial futures with confidence.



Falcon Wealth Planning, Inc.

Falcon Wealth Planning
Falcon Wealth Planning, Inc.
+1 855-963-2526

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