

Falcon Wealth Planning Appoints Industry Veteran Mike Ethridge as Operations Executive

Ethridge brings deep technology and back-office expertise to support firm's next phase of expansion

ONTARIO, CA, UNITED STATES, July 15, 2025 /EINPresswire.com/ -- [Falcon Wealth Planning](#) today announced that Mike Ethridge has joined the firm as Operations Executive, where he will oversee technology, back-office, and process optimization initiatives that support Falcon Wealth's nationwide growth.

Ethridge brings more than two decades of operational leadership in the wealth-management and fintech sectors. Most recently, he served for 11 years as Chief Operating Officer at a multi-billion-dollar wealth-management firm, directing business operations and helping cultivate a collaborative culture that earned "Best Places to Work" honors for five consecutive years. Earlier in his career, he held senior roles at several Los Angeles-area startups, building scalable systems that enabled rapid expansion.



Mike Ethridge, Operations Executive

"Mike's track record of blending operational rigor with a people-first culture is exactly what we were looking for," said Gabriel Shahin, CFP®, CEO & Founder of Falcon Wealth Planning. "His expertise will sharpen our processes, enhance the client experience, and empower our advisors to focus on delivering truly comprehensive, tax-smart planning."

"Falcon Wealth's commitment to fiduciary service and continuous innovation resonates with my own philosophy," Ethridge said. "I'm excited to streamline our infrastructure so the team can keep scaling without sacrificing the personalized attention clients expect."

In his new role, Ethridge will lead platform integrations, workflow automation, and talent-

development programs at Falcon Wealth, ensuring the firm remains agile as assets under management and headcount continue to grow.

“

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*Gabriel Shahin, CFP®, CEO &
Founder of Falcon Wealth
Planning*



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