

# Falcon Wealth Planning Adds Finance Industry Veteran Peter Lombardi, CFP®, MBA

*With 30+ years of experience, Peter Lombardi is an established presence in the Orange County Community and a perfect fit for Falcon.*

ONTARIO, CALIFORNIA, USA, August 15, 2022 /EINPresswire.com/ -- [Falcon Wealth Planning](#) is pleased to announce that Peter Lombardi, CFP®, MBA, will join the Falcon Family as our newest Financial Advisor. Peter has been helping clients through their financial journeys since the mid-1990s and has advisory and managerial experience for companies such as E-Trade, where he has almost 15 years of experience. As a Certified Financial Planner, Peter prioritizes putting his clients in the best position to succeed long-term and treats them as he would his closest family.

“Falcon Wealth is dedicated to their client’s journey to financial paradise,” Peter said. “Helping clients reach their life-long dreams has always been my motivation and I’m happy to join a company with aligned interests.” Peter will be joining Managing Director, Michael Jensen, at Falcon’s Orange County location in Irvine, California. Both Gabriel Shahin, Falcon’s CEO, and Michael are extremely optimistic about Peter’s future with the company, citing his experience as a great asset to the Orange County office and his personality as a fantastic fit for the Falcon team.



Peter Lombardi CFP®, MBA

“

I’m thrilled to share in Falcon's upward trajectory and help it reach the pinnacle of its field.”

*Peter Lombardi CFP®, MBA*

On track to surpass half a billion dollars in Assets Under Management before the end of the year, Falcon is rapidly growing outward and hoping to extend its reach into the national sphere. Peter also sees the potential growth for Falcon. “I’m thrilled to share in Falcon's upward trajectory and help it reach the pinnacle of its field.”

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.

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

[email us here](#)

Visit us on social media:

[Facebook](#)

[Twitter](#)

[LinkedIn](#)

[Other](#)

---

This press release can be viewed online at: <https://www.einpresswire.com/article/585807082>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2023 Newsmatics Inc. All Right Reserved.