Shone Asset Management Announces Name Change to Shone Wealth Management

Rebrand Better Reflects the Financial Advisory Firm's Breadth of Services and Expertise


Mark Shone, CFP®, President, Shone Wealth Management

WALNUT CREEK, CALIFORNIA, UNITED STATES, June 29, 2020 /EINPresswire.com/ -- Shone Asset Management, a fee-only financial planning and investment management firm, announced today that the company will now be operating under a new name, Shone Wealth Management, effective immediately. This new company name, as well as the firm's new website, logo, and other rebranding efforts, better reflects the company's unique value and the full breadth of services they provide.

"The word 'asset' defines the tool that is being utilized, but wealth means different things to different people," says Mark Shone, CFP®, President of Shone Wealth Management. "All of our clients are unique and have different passions and intents. Their assets enable them to focus on the 'wealth' in their life, whether it's legacy-building, philanthropy, or entrepreneurship — and we feel our new name underscores that this is the core of what we do."

Founded in 2005, Shone Wealth Management helps clients make the complex world of personal finance simple through comprehensive wealth management, financial planning, cost-efficient portfolio construction, and ongoing collaboration and monitoring. Shone Wealth Management works with families and couples, women of influence, and entrepreneurs and executives who value the firm's advanced planning process and commitment to customized service and attention. This enables clients to feel confident and worry-free about their ability to thrive financially well beyond retirement.

The firm’s mission is to provide clients with objective financial and investment advice and act as their financial advocate; utilize an investment management process designed for wealth preservation and growth; and offer and communicate perspective and expertise on the financial marketplace.

“Even though we’ll be moving forward with a new name and brand identity, the one thing that hasn’t changed is our client-first mentality,” says Shone. “Our ultimate goal is for our investors to feel confident in their plans and their path forward.”

About Shone Wealth Management

> “All of our clients are unique and have different passions and intents. Their assets enable them to focus on the ‘wealth’ — and we feel our new name underscores that this is the core of what we do.”
>
> *Mark Shone, CFP®, President, Shone Wealth Management*

Based in Walnut Creek, California, Shone Wealth Management provides the services of cash flow planning, estate planning, equity compensation planning, insurance planning, retirement planning, and tax planning. As a fee-only firm, Shone Wealth Management put clients’ best interests first, considering their personal financial goals, time frame, and risk tolerance. It’s this personal attention and singular focus that helps clients realize remarkable results.

Amanda Hyland
Beyond AUM
+1 800-583-2315
email us here
