



## Why Falcon Wealth Planning?

Fee **FO** Only<sup>®</sup>



## Fee Only Advisor

Most advisors charge commissions and don't focus on the importance of financial planning. Their priority is managing money. As a Fee Only Advisor we fully disclose all fees and work as a Fiduciary to make sure the plan we put together is in your best interest.

## Certified Financial Planner

At Falcon Wealth Planning our advisors are CFP's which is the highest standard of Financial Planners. Our clients know they are getting the best advice with their interest put first. Majority of firms focus on investments that happen to do planning. Falcon Wealth does financial planning that do investment

## Fiduciary Standards

At Falcon Wealth Planning, we focus on our clients and make sure they enhance their current situation. We review tax returns and understand our clients so we know exactly what to recommend. We are proud to say we are legally obligated to do what's in our clients best interest.

# Los Angeles Based

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Falcon Wealth Planning, Inc. is a Los Angeles, CA Fee-Only Financial Planner with offices in Ontario, CA, Irvine, CA, Pasadena, CA and Torrance, CA. Falcon Wealth Planning specializes in providing objective financial planning to help clients build, manage, grow, and protect their assets through life's transitions. Falcon Wealth is a NAPFA-Registered Financial Firm and are CERTIFIED FINANCIAL PLANNER™ Professionals.

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# Building Your Wealth

Let's be realistic here. Planning a vacation is way more enjoyable than planning for your future. Vacations are instant, fun and relaxing. But, most of the time, when it comes to planning for retirement, it's built on uncertainty, fear and confusion. Which, in the

end, makes everyone want to avoid planning their future financials.

But, if you plan your retirement right, it doesn't have to be so scary. In fact, planning for your retirement can be just as simple as planning for that exciting vacation that's got you up at night in anticipation for it. With Falcon Wealth Planning, Inc. we can help you plan a financial future that will make you and your family excited for your upcoming years.

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## REFERENCES

### Performance Chart

The Performance Chart represents Falcon Wealth Planning's independent research based on multiple factors that attribute to the unique ability that FWP has in customizing a portfolio. The increased return numbers were based on independent research and should not be relied on for investment results or future performance. This chart strictly highlights the benefits of being tax conscious and managing a portfolio with a tax aware strategy.

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### Tax Aware Allocation:

Analysis has shown certain asset classes should be held in particular accounts. Research has highlighted the additional return you can yield on an after tax basis of roughly 0.5% better, based on research by: 1 Source: 2014 Investment Company Factbook.

<http://blog.helpingadvisors.com/2015/08/20/the-value-of-a-tax-aware-advisor-where-robotics-gets-terminated/>

### Auto Rebalancing:

This technique allows investors to take advantage of market volatility and allow investments to be purchased and sold at their optimal targets to "sell high, and buy low." This strategy yields roughly a 0.8% additional return over a time period from 1994-2014 with a 60/40 portfolio mix. Analysis based on Market Watch writer, Brett Arends.

<http://www.marketwatch.com/story/the-right-way-to-rebalance-your-portfolio-2014-02-18?page=2>

### Tax Loss Harvesting:

FWP has done independent research on Tax Loss Harvesting techniques based on taking advantage of market volatility to help capture tax savings. Our research has concluded that another 1% of additional return can be achieved based on the analysis of someone in the 25% tax bracket.

### Investment Performance on Index Fund vs. Actively Managed Mutual Fund:

# Optimal Allocation:

Annualized number is an approximation. Please note that the number computed from annual data may differ materially from this estimate. Data based on a 60/40 portfolio from performance from 1973-2013 has shown an increased return of 2.41%. Data provided by Dimensional Fund Advisors.

Data has shown that additional return has been achieved through Index Funds versus investing in Actively Managed Mutual Funds. We have sited Forbes in an article that calculates the savings. Over, the research concluded a potential 2.01% better return with Index Funds versus Actively Managed Mutual Funds.

<http://www.forbes.com/sites/rickferri/2013/11/18/another-reason-to-buy-index-funds/>

## GET IN TOUCH

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