

This brochure supplement provides information about Gabriel Shahin that supplements the Falcon Wealth Planning, Inc. brochure. You should have received a copy of that brochure. Please contact Gabriel Shahin if you did not receive Falcon Wealth Planning, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Gabriel Shahin is also available on the SEC's website at www.adviserinfo.sec.gov.

Falcon Wealth Planning, Inc.

Form ADV Part 2B – Individual Disclosure Brochure

for

Gabriel Shahin

Personal CRD Number: 5721782

Investment Adviser Representative

Falcon Wealth Planning, Inc.

3333 Concourses St. Ste 4203

Ontario, CA 91764

855-963-2526

www.falconwealthplanning.com

Gabriel@falconwp.com

UPDATED: 04/05/2018

Item 2: Educational Background and Business Experience

Name: Gabriel Shahin **Born:** 1984

Educational Background and Professional Designations:

Education:

Masters of Business Administration, University of Massachusetts Amherst - 2017
Business Administration Business, Arizona State University - 2006

Designations:

CFP® - Certified Financial Planner

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- i. Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- ii. Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

AIF® - Accredited Investment Fiduciary®

- The AIF designation, awarded by the Center for Fiduciary Studies, an fi360 company, demonstrates the focus on all the components of a comprehensive investment process, related fiduciary standards of care, and commitment to excellence.
- AIF designees must complete 6 steps to earn the designation: 1. submit registration and fee; 2. successfully complete a specialized program on investment fiduciary standards of care; 3. pass a comprehensive examination; 4. upon passing, submit the accreditation application and fee; 5. complete annual continuing educational requirements; 6. pledge to abide by the designation's code of ethics.

Business Background:

01/2015 - Present	Principal Falcon Wealth Planning, Inc.
04/2014 – 03/2015	Financial Planner Pure Financial Advisors
08/2013 - 04/2014	Insurance Agent ING Insurance
10/2010 - 04/2014	Investment Consultant TD Ameritrade
10/2009 - 09/2010	Financial Advisor Edward Jones
10/2007 - 09/2010	Basketball Coach Tempe Union High School District
12/2006 - 07/2009	Branch Manager 4 US Bank

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Gabriel Shahin is not engaged in any investment-related business or occupation (other than this advisory firm).

Item 5: Additional Compensation

Gabriel Shahin does not receive any economic benefit from any person, company, or organization, other than Falcon Wealth Planning, Inc. in exchange for providing clients advisory services through Falcon Wealth Planning, Inc..

Item 6: Supervision

As a representative and owner of Falcon Wealth Planning, Inc, Gabriel Shahin works closely with the chief compliance officer, Rachel Vonbank, and all advice provided to clients is reviewed by the supervisor prior to implementation. Gabriel Shahin adheres to applicable regulations regarding the activities of an Investment Adviser Representative, together with all policies and procedures outlined in the firm's code of ethics and compliance manual. Rachel Vonbank's phone number is (855) 963-2526.