MARK T. EALY, CFP, CPA

Professional Wealth Advisor

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About

Mark is a Certified Financial Planner (CFP), Certified Public Accountant (CPA), Pension Plan Consultant (PPC), and Retirement Income Certified Professional (RICP), with offices in Carlsbad, California. With over 30 years of experience in the financial industry, he provides wealth management and investment consulting services to business owners, retirement plans, retirees, and families.

Prior to starting Wealth Management Group in 2003, Mark began his professional career as a Certified Public Accountant (CPA) with BDO Seidman in Detroit, Michigan. After many years of CPA and financial industry work, Mark made the decision to follow his true passion; to help people build and protect their financial resources, so they can live the style of life that they want. This includes taking care of family, retirement, managing taxes, paying for college, estate planning, and charitable giving.

In addition to his CFP, CPA, PPC and RICP designations, Mark holds FINRA Series 7 (Securities) and Series 66 (Investment Advisor) licenses, as well as state licenses for insurance, annuities, long term care, and real estate. In 2013, the Mayor of San Diego appointed Mark to the Board of the San Diego City Employees Retirement System (SDCERS), which oversees $6 Billion in employees' retirement investments. Mark is a member of Ed Slott's Elite IRA Advisor Group and has also served as a "Subject Matter Expert" for the Certified Financial Planner Board of Standards, writing questions for the national CFP exam. Mark devotes a significant amount of time to continuing education and advanced study.

Born in Detroit, Michigan, Mark moved to San Diego in 1993 and now resides in Carlsbad, California with his wife Rebecca. Together they have six children ranging in age from 24 to 40, and a 13-year-old granddaughter. Mark enjoys pickleball, exercise, reading and most importantly, family time. He also is a member, and Past President, of the Carlsbad Hi Noon Rotary and serves on the Board of Directors for Solutions For Change.

Our Approach

Our wealth advisory process is based on fiduciary principles – an approach that places our clients' interests at the forefront of everything we do. As Certified Financial Planners, we are held to a higher *fiduciary* standard than other "financial advisors".

Great care is taken in assembling teams of financial professionals working in concert, to make sure all aspects of a client's financial life are being addressed. Your team may include your Certified Public Accountant, an Estate Planning Attorney, Insurance Specialist, and other specialty professionals as needed. We coordinate each professional's expertise into customized recommendations for your unique circumstances.

Our Philosophy

We believe that the independent business model provides the best framework to serve our clients. We believe offering objective guidance, free from sales quotas, proprietary products, and limited choices, is vital to our ability to provide best in class solutions for our clients' individual needs. We partner with Independent Financial Group (IFG) as our broker dealer. IFG is based in San Diego and serves over 800 independent advisors across the nation.

Our Mission

Our passion is to bring peace of mind and confidence to our clients' financial lives. We are dedicated to our clients' lifelong success, and serve our clients with sincere care, respect, and integrity. Our clients and their families deserve the attention, care and guidance that can only be provided through long-term financial partnerships. Therefore, we seek long term client relationships, and to serve only those for whom we are a good fit, for whom we can make a significant impact. New clients come to us by way of introduction from CPAs, attorneys, and other professionals, and of course, from our incredible clients.