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CELEBRATING 55 YEARS

Thomas and Sean Condon form Condon Wealth Management

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Since 1972, the Condon name has been associated with advice and strategies for individuals, families, and small businesses, in several different capacities, but it wasn't until this year that the separate services offered by the individuals were merged into one comprehensive practice.

Thomas Condon, CPA, PFS of Kingston has re-branded their businesses under the name Condon Wealth Management with offices located at 15 Caswell Ln.

Condon, who has operated a Certified Public Accountant (CPA) practice in the area since 1972 formed a separate wealth management practice, TLC Financial Advisors in the 1990s. Today he, along with his son Sean Condon, CFP that the separate practices have been combined and expanded under the umbrella of Condon Wealth Management.

Sean Condon, who has been with the practice since 2002, will serve the new entity as executive vice president and will oversee wealth management operations and the efforts of the other team members who include a director of client services and a new client services manager, among others.

The Condon Wealth Management team had worked with outside advisors in the industry to help re-position the company and its business plan.

Sean Condon said, "We see our role and offerings as greater than the sum of the individual parts. We have modeled Condon Wealth Management along the 'multi-family office' concept, providing a comprehensive suite of financial services supported by technology and processes that deliver superior wealth management and tax consultancy services. Consumers are far better educated today, and both expect and deserve solid value and unbiased advice. Our client's hire us to be their advocate and manage results. The world has evolved beyond the old model where investments were the primary focus of the advisor/client relationship. The market as a whole has been underserved and many people we see for the first time have never had a true financial advocate working on their behalf. We look forward to building on the foundations my father has laid over the past four decades to providing an even higher level of comprehensive advice and attention that will make a real difference in people's lives."

Condon Wealth Management is planning a seminar series on "Financial Literacy," that will address elements of wealth management and offer some practical advice to families and business owners. Details of the series will be released at a later date.

Sean Condon said, "For example, wealth management is about so much more than investments. We focus on goals, a written and constantly monitored plan to insure our clients won't run out of money. Our process pays close attention to tax planning in particular how a client will efficiently manage distributions in retirement. Investments are important, but are less important than the strategy that surrounds them."

About Condon Wealth Management

Condon Wealth Management is a privately held independent Wealth Management "Multi-Family Office" firm specializing in the development of process driven plans and strategies for individuals, families and small businesses. The firm offers suite of services that include financial planning, investment management, risk management, and tax consultancy services among others. The firm provides solutions and guidance that originate from a position of knowledge and independence. Condon Wealth Management maintains offices at 15 Caswell Ln., Plymouth, Mass.