



For This Long Beach Financial Advisor, the Devil Is in the Details

Bond Wealth Management

No client has ever told Eric Bond they have too much money in retirement. Not a single one in nearly two decades of practice.

“While some clients do reach the point where they feel they have enough money,” he says, “for most, the number one concern is ensuring they don’t outlive their money and that their wealth will not be passed on to the one family member whom they don’t want to receive any: Uncle Sam.”

Bond’s motto: “*Not on my watch will a problem arise with my clients’ accounts.*”

It’s a responsibility Bond, owner of Bond Wealth Management, takes very seriously. To him, his clients, most of whom are retirees and pre-retirees, are like family, and he is passionate about helping each one achieve their retirement goals and dreams.

“I understand their money is very important to them,” he says. “My job is to help create, grow and protect my clients’ wealth so it can be passed on to them and their loved ones in a tax-efficient manner.”

Bond tailors investment plans to each client’s specific goals, needs and risk tolerance. Frequent face-to-face meetings help ensure that each plan remains congruent with the client’s goals.



Long Beach Born and Bred – Bond was born, raised and schooled in Long Beach and likes to say he knows everyone in the city. “My third grade teacher was my daughter’s Kindergarten teacher,” he says. “My daughter, my mother and I all went to the same high school.” Bond served on the board of the Long Beach Estate Planning Council. He was a Master Elite Advisor with Ed Slott and Company.

“I listen, I diagnose, and I explain,” Bond says. “It’s important to me that all of my clients know exactly what is going on with their money and feel comfortable with their investments.”

Tax-Efficient Retirement Investing

Bond prides himself in not being a typical advisor, and he’s not. He’s down-to-earth, direct and exceptionally friendly. As a fiduciary, he is obligated to put clients’ needs ahead of his own, but you sense he would do this even if he didn’t have to.

Bond believes the devil is in the details, and that belief is reflected in his holistic, comprehensive approach to wealth management. He keeps close tabs on everything from beneficiary forms to living trusts, all retirement plans, pension options and even the titles on his clients’ homes to help ensure everything is in order. He makes it a point to meet his clients’ children and grandchildren when possible, and has even been known to reach out to his clients’ parents, working with them to help make sure their estates are set up properly. “That way, when they pass, my clients will receive their inheritance in a tax-efficient manner,” he explains. “I work hard to protect my clients.”

“Most people focus on wealth accumulation, and of course that’s very important, but you also have to think about wealth distribution,” Bond says. “Why grow it if a good portion of it can be lost to taxes? Just like in a football game, it doesn’t matter what the score is at halftime. What matters is the score at the end of the game.”



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