Camelback Wealth Consultants

An Independent Firm Focused on You

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Camelback Wealth Consultants is an independent, full service financial firm dedicated to helping improve your financial freedom. We are affiliated with one of the most respected independent broker-dealers in the industry and are truly objective in the advice and products we offer our clients. You may not have the time, desire or expertise to properly plan and manage certain financial aspects of your life. At Camelback Wealth Consultants, we strive to provide exceptional service and to make a difference in the lives of our clients.

Educational Planning

A college education is among the most important milestones in a child's life. Advanced guidance is critical to determine and understand which college savings strategy is best suited for your family. As an independent advisor, we may have options available to assist you in this area. Our education planning helps to identify an appropriate strategy based on your family's unique situation. The sooner you start planning, the better prepared you will be to meet the challenges the future may present. We are here to help make your dreams a reality.

Retirement Planning

Whether you are just starting to plan, getting ready to retire, or are already enjoying retirement, we will develop a plan designed to help you retire comfortably, with the confidence that you will not outlive your assets. We listen closely to your personal goals, what matters most to you, and believe no detail should be disregarded. You will see the value in working with us to clarify, pursue, and achieve your retirement goals.

Estate Planning

The legacy you leave is important to you and your loved ones. Taking the right precautions now can reap big rewards later. We offer professional guidance to help you pass on as much of your wealth as legally permissible—leaving your loved ones with an inheritance instead of a tax bill.

Business Financial Planning

As a business owner, you need expert advice and experience to help develop the right plan for the future of your business. We provide sophisticated planning solutions for you including retirement strategies, risk management, and succession planning. You've worked hard to build your business—let us help you develop a business exit strategy so you can enjoy the retirement you've dreamed of.

Now is the time for a relationship built on personal service and unbiased advice to help you achieve your financial goals!

I am passionate about providing my clients with independent, comprehensive advice to help them achieve their financial goals.

~ Mark Herding

About Mark Herding, CFP®, RICP®, CMFC®, LUTCF

With over 25 years of financial industry experience, Mark provides comprehensive retirement income planning. He is dedicated to helping his clients fulfill their financial goals and works closely to determine their personal needs in order to develop customized strategies. Mark values independence and deeply respects hard work.

Mark is a Certified Financial Planner™ professional, Retirement Income Certified Professional, Chartered Mutual Fund Counselor℠, and Life Underwriter Training Council Fellow. He graduated with a bachelors degree in Finance from Arizona State University and an MBA from Grand Canyon University. Mark currently holds FINRA Series 7,24,63, and 65 licenses. He enjoys coaching youth sports and is a member of the ASU Alumni Association and the Brophy College Prep Dad's club.

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