



A True Next Generation Firm

How We Help You

Financial Planning

Portfolio Management

Retirement Planning

Cash Flow Analysis

Insurance Services / Risk Management

Alternative Investments

Legacy and Estate Planning

Corporate Advisory

Tax Strategy and Planning

Your Family's Future Starts With a Strategic Financial Plan

Our deep experience in the investment, legal and accounting industries have given us the unique insight to help you protect, grow and pass-on your family's wealth. Using the financial plan as our base, we will craft you and your family an investment policy, combined with strategic financial planning for the long-term and monitor on an ongoing basis. Our all-encompassing advice is structured to provide you and your family peace of mind for generations to come.



**Our team has over 50 years
of financial industry experience**

Chris Denholm
CO-FOUNDER

Tristan Lewis
CO-FOUNDER

Mitch Stein

PRESIDENT

Adam Vertes

MANAGING DIRECTOR

Will Kobyjanec

DIRECTOR OF FINANCIAL PLANNING AND TAX



Manage All Facets of Your Family's Financial World in One Place

[Learn More](#)

Client Logins



[Objective Vault Log In](#)



Fidelity Log In



Getting Started is Easy

OCM Wealth is committed to helping you forge a better future with objective and customized financial advice.

If you are interested in learning more about working together, we encourage you to please contact us by either email, phone, or completing the form below.

NAME

E M A I L

P H O N E

M E S S A G E

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