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KC Martel

5134 Boda Place

Calabasas, CA
91367

Phone:
818 2323 411

Fax:
818 6880 411

KC@CompanionWM.com

Market Watch

July 09, 2019 @ 01:24 PM

Dow Jones Industrials ETF	-0.1%
Nasdaq Composite ETF	+0.1%
S&P 500 ETF	-0.0%
OSX Oil Service Sector Index ETF	-5.7%

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Helping to Define and Create the Quality of Life You Desire

A clear understanding of where we need to go is often the most important, yet overlooked, component of investing. In the beginning, you know more than we do about where we are starting from. We will educate and include each other through a collaborative process, with the ultimate goal of financial freedom.

Through relevant and personalized advice, we work with you to gain a deeper insight into your financial goals and enhance your net worth.

We offer comprehensive investment strategies through a full range of investment and financial planning services. These customized portfolios are based on current, unbiased research and industry leading technology.

We have the ability to combine the robust investment capabilities of an institution with the flexibility and personal service of an independent firm. Having no proprietary products or secondary financial motives allows us the freedom to offer you truly objective investment advice. At Companion Wealth Management, we strive to uphold a fiduciary standard, with a legal obligation to always put our client's needs first.

Companion Wealth Management is known for its ability to deliver professional services in a comfortable setting. Whether it's about retirement income and wealth transfer planning or getting you to a work optional lifestyle, we are passionate about helping professionals, business owners, families, and individuals get where they asked us to guide them. We hold this relationship and the trust that comes with it in the highest regard. And we hope you agree that every important journey, including your financial success, benefits from a knowledgeable and trustworthy companion.