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Waterford is dedicated to managing and minimizing portfolio risk for our clients.

Waterford Capital Investment Advisory Services, LLC is a Registered Investment Advisory firm (RIA) headquartered in Dallas, Texas. Senior Investment Advisor and founder David O'Connor and his team focus on specific risk metrics to create investment portfolios that endure and excel through various economic cycles. Waterford designs, constructs, implements and manages investment portfolios for high-net worth families, foundations and endowments. Waterford's client accounts are segregated and custodied on Charles Schwab's institutional platform. We invite you to peruse our website with the hopes that you learn something new and find our approach interesting enough to justify a meeting/consultation. In the event that we accomplished our goal, please contact us to have a discussion.

Thank you for visiting.







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