As Seen in The Wall Street Journal

O'Connor Portfolio Management

Your Financial Plan is Unique

In September 2016, Catherine O'Connor, founder of O'Connor Portfolio Management, joined a select group of Wealth Managers named by Five Star Professional, in partnership with The Wall Street Journal, as a 2016 Five Star Wealth Manager. This elite ranking recognizes commitment to providing quality services to clients. "We continually strive to 'stand out' with portfolio performance and client service," O'Connor said in a statement. "We feel grateful and fortune to have a 24-year relationship with our clients and their referrals. O'Connor Portfolio Management is an independent, fee-only portfolio management and financial planning firm with a custodial relationship at Charles Schwab Institutional. "There are no commissions and no products," O'Connor said. "We act as a fiduciary, which means, by law, we are acting in our clients' best interests."

One way in which O'Connor Portfolio Management stands out is by favoring personal portfolios over mutual funds or annuities. "We believe they are more effective considering how money compounds," O'Connor explained. "When you invest in a product like a mutual fund or annuity, you cannot choose the buy entry price or the position size." Another way which makes O'Connor's management approach unique is that they construct a custom portfolio for each investor. Client's assets are not combined with other client's assets since people invest at different times.

O'Connor Portfolio Management clients are primarily medium-to-high-net-worth. They are nearly all retired. "Their hard-earned money is very important to us," O'Connor said. "We are very focused on risk management and implementing a buy plan, as well as a sell plan from the beginning." The firm's proprietary technology and usage of charting as a risk management tool helped its team to anticipate the financial crisis that began in late 2007. "We were out of the stock market in April of 2008," O'Connor said. "Our clients did not suffer through the stock market crash that happened in September."

O'Connor Portfolio Management is all about client service. Plans are managed on at least a quarterly basis. "Risk management, compound interest, and investments that pay solid rising dividends, that's what it's all about," she said.

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