



OBJECTIVE CAPITAL
MANAGEMENT

WHO IS OBJECTIVE CAPITAL MANAGEMENT

YOUR FAMILY'S FUTURE STARTS WITH A STRATEGIC FINANCIAL PLAN

Our deep experience in the investment management industry has given us the insight to help you protect, grow and pass-on your family's wealth. Using the financial plan as our base, we will help to craft an investment strategy, combined with strategic financial planning for the long-term, monitored on an ongoing basis. Our strategic advice is intended to show you and your family a path forward for generations to come.

OUR EXPERIENCE

Our team has over 50 years of experience working inside the largest wealth management firms in the country. We have seen a variety of different perspectives on how to approach wealth management and our goal is to incorporate what we feel are the best practices while attempting to remove certain conflicts of interest and sales practices that, in our opinion, do not serve a client's best interest.

OUR SIZE

As a boutique firm, we are selective in taking on new relationships. Our aim is to deliver a high level of service, devoting adequate time to each client. We believe in customizing each client portfolio to align investments and planning with long-term objectives. We work hard to find the right solutions and stay on top of industry trends. We do not believe that each client's life fits into a model and we manage portfolios with that thought in mind.

Every OCM client is a meaningful and valuable relationship.

OUR PHILOSOPHY

We believe that there is no secret formula to managing money, and instead focus on controlling what we can control. We believe that value comes from areas such as: long-term planning, tax mitigation, cost efficiency, asset location, and prudent risk/reward solutions for our clients. In the end, this broader focus should have a greater impact on success.

OUR YOUTH

We are here to work hard for you and plan on being able to do that long into the future. We are students of our industry and stay on top of latest trends and technology. We are a firm that understands the importance of evolution and will strive to find ways to improve our business and remain at the forefront of our field.





CHRISTOPHER M. DENHOLM, CO-FOUNDER
CHRIS@OCMWALTH.COM
216.586.6388

Chris spent the majority of his early career inside some of America's wealth management firms. His focus was in wealth management and private banking during his time at Merrill Lynch, UBS and Morgan Stanley. In 2011 he co-founded OCM with the goal to build an independent advisory firm that works with individuals and families to manage their entire financial situation. Chris resides in Cuyahoga Falls with his wife Chrissy and their three children.



TRISTAN R. LEWIS, CO-FOUNDER
TRISTAN@OCMWALTH.COM
216.586.6389

Prior to Co-Founding OCM in 2011, Tristan spent more than seven years in the Private Wealth divisions of some of Wall Street's biggest brokerages, including Bear Stearns, Merrill Lynch and Morgan Stanley. Tristan thinks of OCM as a company forged from the best practices of those traditional firms with the innovations of the modern independent model.

Tristan attended high school at Western Reserve Academy and continued on to graduate with a bachelor's degree from Georgetown University in 2002, where he was a Captain of the varsity golf team. He currently lives with his wife, Caroline, and their three children in Pepper Pike. When not spending time with his family, Tristan enjoys playing golf and fly-fishing.



MITCH STEIN, PRESIDENT
MITCH@OCMWALTH.COM
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Mitch began his wealth management career in 2005 after graduating from the University of Michigan with a B.A. in History. He spent the early years of his career in Chicago in the training programs at Ameriprise and Smith Barney before joining Fifth Third Securities in 2010. In 2019 he joined OCM as President and brings valuable knowledge and experience from his previous firms.

Mitch moved back to Cleveland in 2016 after spending 11 years in Chicago. He currently lives with his wife, Macy, and their three children in Pepper Pike. When not spending time with his family, Mitch enjoys playing golf, squash, and paddle tennis. He also serves on the Board of Trustees at his alma mater, University School.



ADAM VERTES, MANAGING DIRECTOR
ADAM@OCMWALTH.COM
216.586.6031

Since 1994 Adam has focused on advising families with multi-generational wealth management. Adam has developed a unique and dynamic process that provides clarity, comfort and confidence to his investors. Adam is a Board Member at Lawrence School and The Cleveland Racquet Club. His interests include traveling, tennis, guitar and photography. Adam lives in Pepper Pike with his wife Martha and has three children that are pursuing their dreams in New York, Colorado and California.



WILLIAM KOBYLJANEC CPA, J.D.,
DIRECTOR OF TAX AND FINANCIAL PLANNING

Will has worked in the financial consulting and planning field for over thirty years before joining OCM Wealth as the Director of Financial Planning and Tax at OCM. Will graduated with a bachelor's degree from Case Western Reserve University in 1976 before attending Cleveland Marshall College of Law. He has been a licensed attorney and CPA since 1980.

WORKING TOGETHER WITH YOU



- Custody Services
- Brokerage
- Trading Platform
- Online Account Access



- Your online relationship platform with us
- Account Aggregation Software
- Secure Vault for document storage
- In depth planning tools
- Financial statements



- Tailored Lending Platforms
- Security Based Lending



- Custom Insurance Solutions
- Full range of annuity contracts



- Performance Reporting
- Income Forecasts
- Allocation Reports
- Quarterly Statements

Above mentioned services and capabilities are available to all clients, but not automatically included with advisory fees.
Objective Capital Management LLC is not affiliated with any of the third party vendors listed above.

OUR CAPABILITIES

INVESTMENT MANAGEMENT

FINANCIAL GOALS

Goal Analysis
Financial Plan
Retirement Income

INVESTMENT MANAGEMENT

Portfolio Construction
Customized Solutions
Manager Selection

ASSET ALLOCATION

Stocks – Bonds – Cash Alternatives
Risk Tolerance

TAX PLANNING

Taxable vs. Tax-Free
Tax Efficiency
Asset Location

FAMILY PLANNING

COLLEGE PLANNING

529 Plans
Custodial Accounts

CHILD LIVING EXPENSES

Special Needs

PARENTS

Healthcare
Living Expenses
Housing

RETIREMENT PLANNING

RETIREMENT PLANS

401k
IRA & Roth
Rollovers

IN-SERVICE DISTRIBUTIONS

Age 59 ½

SOCIAL SECURITY

Benefit Maximization Analysis

INSURANCE SOLUTIONS

GOAL PROTECTION

Life Insurance Review
Personal Lines
Legacy Planning

TAX FREE WEALTH

Cash Value
Accumulation
Strategies

LONG TERM CARE

LTC Insurance
Different Options
Vs.
Self Insurance

ESTATE PLANNING

WILLS

Health Care POA
Living Will
Durable POA

TRUSTS

Living Trust
Credit Shelter
Special Needs
Generation-Skipping
Residence Trust

HEIRS

Beneficiary Planning
Annual Gifting
Estate Transfer
Transfer on Death
Asset Titling

CHARITABLE GIVING

Charitable Trusts
Donor Advised Funds
Legacy Planning

LENDING NEEDS

SECURITIES-BASED LENDING

Asset Secured Loans Margin



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Above mentioned services and capabilities are available to all clients, but not automatically included with advisory fees.
Insurance products and services are offered and sold through Objective Capital Management LLC and its individually licensed and appointed agents.

FIDELITY BY THE NUMBERS

AS OF 9/30/19¹

MARKETPLACES WE SERVE



Retail



Workplace



Institutional



Intermediary



APPROX.

40K+ Associates



APPROX.

30M+ Investors



197

Investor centers



13,500+

Financial advisory firms

22,000+

Businesses managing
employee benefit programs



599.9K

avg. daily
commissionable trades

\$7.8T

Total **Customer**
Assets (AUA)

\$3.0T

Total **Discretionary**
Assets

55%

Retirement % of Total
Administered Assets

72M

Total **Customer**
Accounts



This information packet is intended to act as a brief overview of who we are as a firm, what we strive to do and what firms we have as partners. It is not intended to be an advertisement or to solicit any type of security purchase or recommendation. Objective Capital Management is a Registered Investment Adviser. Advisory services are only offered to clients or prospective clients where Objective Capital Management and its representatives are properly licensed or exempt from licensure. This information packet is solely for informational purposes. Past performance is no guarantee of future returns. Investing involves risk and possible loss of principal capital. No advice may be rendered by Objective Capital Management unless a client service agreement is in place. Objective Capital Management LLC is not affiliated with National Financial Services/Fidelity.