



New Book for RIAs Offers Guide for Integrating Company Culture During Mergers and Acquisitions

San Rafael, Calif. – July 19, 2021 – Private Ocean is proud to announce that Greg Friedman, CEO and Founder, and Cynthia Greenfield, Chief Experience Officer, have published their latest book, *Integrating Culture in Successful RIA Mergers and Acquisitions: The Guide for Financial Advisors*, now available on [Palgrave.com](https://www.palgrave.com) and [Amazon.com](https://www.amazon.com).

“While all firms are unique, there are some common components to successfully bringing firms together culturally, which in turn impacts the success of the business,” said Greg Friedman. “We are incredibly honored to share our experiences and hopefully offer advice to firms who are either considering, in the midst of, or past the initial stages of a merger or acquisition.”

“Our goal with this book was to help advisory firms navigate their work culture journey, and this is applicable through M&A activity or otherwise,” added Cynthia Greenfield. “Through this process, we wanted to show that with change, setbacks are inevitable, and staying focused on culture is key to progress. Success is always possible with determination, persistence, and patience.”

In *Integrating Culture in Successful RIA Mergers and Acquisitions*, Friedman and Greenfield share their blueprint for achieving and maintaining a successful, positive work culture, tackling head-on the obstacles that may appear during an M&A event between two registered investment advisory firms, and offering solutions based on real-world experiences. This book also shows the evolution of a \$2B+ advisory firm over the course of a decade, and offers real stories of obstacles, adjustments, and victories along the way.

Some early praise for *Integrating Culture in Successful RIA Mergers and Acquisitions*:

“Greg Friedman and Cynthia Greenfield’s book could not come at a more perfect time. Providing a fresh perspective on the topic of successful deal making, they focus on a critical component that often is missed in the discussion; Culture.” –Suzanne Siracuse, CEO, Suzanne Siracuse Consulting

“This book is a must-read for anyone looking to enter into the advisor M&A space with hopes of retaining the energy, growth and cohesiveness that got them there.” –Doug Fritz, Founder and CEO, F2 Strategy

“I believe that leaders in advisory firms need permission to be real, and there is so much room for authenticity and vulnerability in the ‘old school’ world of finance. That Greg and Cynthia put their focus squarely on the people component of M&A deals drives home how culture and core values ultimately lead all decisions. I love that this book brings that ethos to the forefront.” –Megan Carpenter, Co-founder and CEO, Ficomm Partners

Integrating Culture in Successful RIA Mergers and Acquisitions is available now. For more information, follow Private Ocean on twitter [@_privateocean](#) and visit privateocean.com.

About the Authors:

Greg Friedman is an innovator and advocate for excellent wealth management. He is co-founder and CEO of Private Ocean, one of the West Coast's leading wealth management firms. He's also the former co-founder of Junxure, an industry leading CRM for advisors. Friedman is widely recognized as one of the nation's top financial advisors. Investment Advisor Magazine named him as one of its Top 25 most influential financial advisors in 2008, 2009 and 2010. In 2008, Financial Planning Magazine included Friedman in its elite list of financial "Movers and Shakers." In 2007, Charles Schwab honored him with its prestigious IMPACT Award® for "Best in Tech." Friedman plays a lead role in the movement toward tighter technology integration in the financial planning industry. Greg was also recognized in *InvestmentNews'* 2017 Class of Icons and Innovators for his contribution to the advancement of the financial advice profession and for conceiving new ideas and tools that have propelled the industry forward. In 2018, Greg was named CEO of the Year at the WealthManagement.com Industry Awards. In 2020, he named a Nonprofit Leader by the *North Bay Business Journal* for his work on the Board at The Marine Mammal Center. He has previously authored two books; *Advisory Leadership: Using the Seven Steps of Heart Culture to Create Lasting Success for Any Wealth Management Firm*, and *The Financial Advisor M&A Guidebook: Best Practices, Tools, and Resources for Technology Integration and Beyond*.

Cynthia Greenfield is a Leadership Coach and owner of the consulting firm, in the Momentum, and also the Chief Experience Officer at Private Ocean Wealth Management. She brings 15 years of experience working with leaders and teams in the financial, technology, and academic sectors, helping businesses develop strategies that build stronger relationships and create organizational growth during disruption and transition as a result of a merger, acquisition, change in management, or expansion. Her goal is to inspire positive motivation, eliminate obstacles, and help move people and businesses forward purposefully and collaboratively. Working with executive teams and individuals, Cynthia focuses on the power of intention, thoughtful action, and accountability that drives and delivers meaningful results. She believes that clear communication, confidence and productivity can be inspired if nurtured in a trusted partnership. Together, Cynthia and clients dream big, set goals, navigate obstacles, and build a roadmap to a complete and fulfilling life.

About Private Ocean

Private Ocean is a West Coast-based wealth management firm deliberately structured to give clients the intimate experience of a small firm while harnessing the power, depth and discipline of a much larger one. Formed in 2009, Private Ocean (www.privateocean.com) has locations in San Francisco, San Rafael and Seattle.

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