Private Ocean

Personal and Powerful Wealth Management

Wherever you are on your life's journey, we have an advisor to meet you.

We Believe In More Than Just Managing Money.

At Private Ocean, we judge ourselves by the strength of the relationships we build with our clients and our team. Like you, we are parents, siblings, spouses, friends, and community members.

As part of the Private Ocean family, we get to know you and we focus on what makes you tick. Sure, we offer financial advice. But we're also delighted to give you our thoughts on where to find the best pizza in San Francisco and an unbeatable cup of coffee in Seattle. We're here for you as you send your children off to college and excited to guide you on how to achieve the retirement you envision when you become an empty nester. Wherever you are on your journey, we're here beside you, every step of the way.

Planning

Everyone's financial plan is unique. We discuss philosophy, lifestyle, your goals for your family, and we help educate you, so you really understand your options.

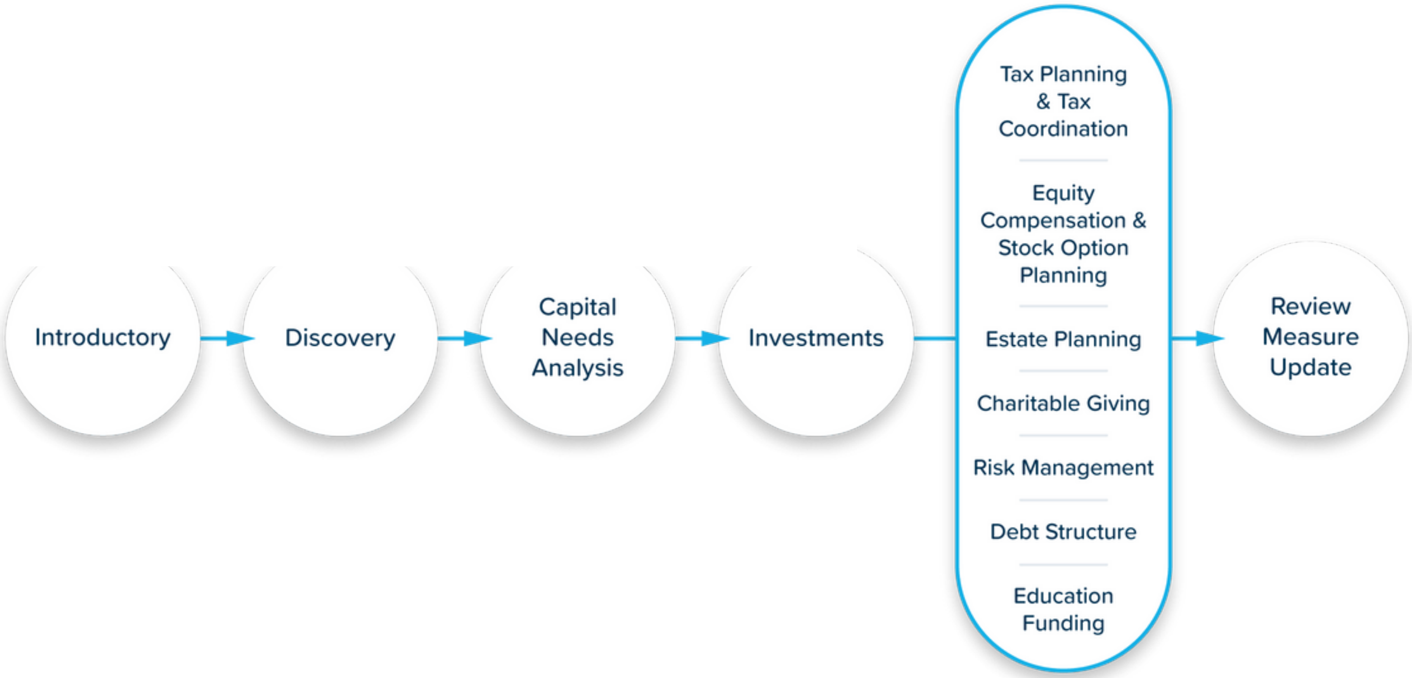
Investing

We invest your assets using an academic-based discipline utilized by major institutions. Our portfolios are intended to maximize growth and stability and minimize risk.

Partnership

We are passionate about helping people achieve their life goals. We pride ourselves on being trusted partners to our clients, supporting them throughout their lives and guiding them to make informed decisions.

Our Six Step Process



Your relationship with your wealth manager should be personalized to help you meet your goals. What can you expect when you sit down with one of our advisors? Introducing our six step process.

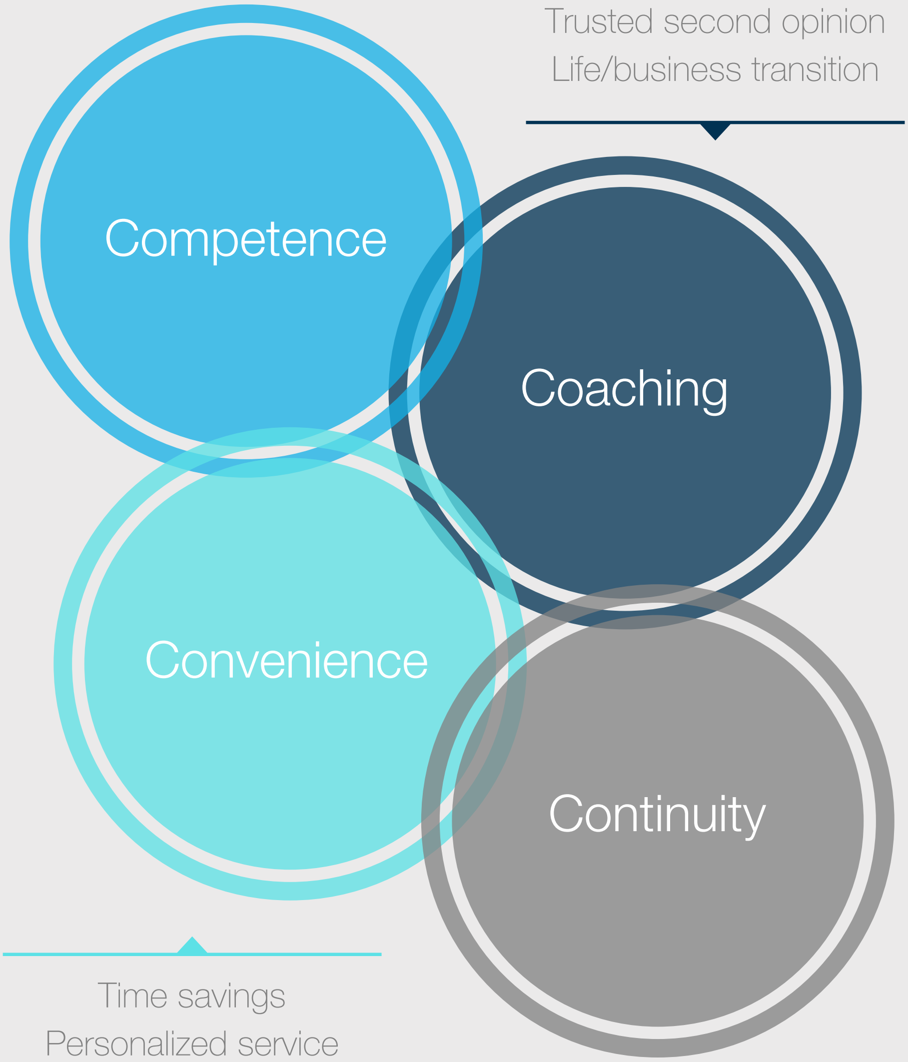
At our first meeting, we'll talk openly and make sure we're a good fit for each other. Next, we'll take a deep dive into what matters most to you. What are your passions and life goals? What would you like to achieve through partnering with a financial advisor?

Once we've explored each of these areas, we'll integrate them into a comprehensive financial plan for you that we will regularly revisit to make sure we're always working toward your goals. Along the way, we communicate with you and coordinate our services with your attorneys, tax specialists, insurance and banking professionals. All of these elements are designed to give you the peace of mind knowing that your financial life is in knowledgeable, capable and dependable hands.

Our Services - The 4 C's

Financial planning
Holistic integration
Investment selection & monitoring
Asset allocation & rebalancing
Risk management
Income strategies
Tax/estate considerations
Specialized expertise

Peace of mind
Education
Partnering on plan and goals
Emotions, biases and stress
Objective feedback
Trusted second opinion
Life/business transition



Time savings
Personalized service
Coordinate trusted professionals
Reporting
Integrated technology

Spouse involvement
Children engagement
Multigenerational planning
Legacy
Philanthropy

Our Team

Your Experience is Everything.

Everything we do is in service of our clients. This isn't just a guiding principle – it's our shared commitment to making sure you are heard, understood, and guided toward achieving your goals. Your assets represent your time, your plans, and your hopes for the people you care about. We believe they deserve nothing less than our deepest, most personal investment.

Private Ocean integrates financial planning, portfolio management and behavioral guidance. We serve individuals, families and businesses, helping them through every stage of their financial journey, whether it is achieving financial freedom, funding an education, managing life's changes and disruptions, planning for retirement, or leaving a legacy. Meet the team at privateocean.com/team

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About Private Ocean Wealth Management

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, the firm has locations in San Rafael, San Francisco, and Seattle. Private Ocean works with senior executives, business owners and other affluent individuals and families with a minimum of $2 million to invest.

Important Disclosure Information

Your financial needs are unique, and so are you. Let's have a conversation and find the right advisor to help you achieve your goals.