

SABRINA LOWELL

MANAGING PARTNER,
PRIVATE OCEAN WEALTH
MANAGEMENT



Education:

B.A. from Principia College

Community involvement:

Teacher for the Financial Planning Association Externship; council member at the CFP Board of Standards Women's Initiative; annual mentor for the Financial Planning Association Residency Program

Biggest accomplishment:

Helping build a career path through a firm – personally going from intern to COO of Mosa-

*Sabrina Lowell,
Managing
partner, Private
Ocean Wealth
Management*

ic Financial Partners. Then being able to mentor other women through pieces of that track. Part of mentoring and managing is discovering what type of leader I wanted to be, honing those skills and figuring out ways to grow those skills over time.

Biggest challenge or setback: Biggest challenge was helping shepherd the sale of a firm I worked with for 16 years and collaborating as part of the leadership team in bringing company cultures together.

Inspirational mentor:

My study group Xcelsior consists of 11 peers spread across the country, the initial common thread of being the second generation within our firms. Fourteen years later we've become like a personal board of directors for each other.

Covid-19 response:

We've been able to stop doing things we likely wouldn't have otherwise pushed to do, and improved the way we deliver our core services. Video chat has been

vital for vulnerable money conversations on the front line with clients, sharing both challenges and struggles but also celebrations and milestones, and providing reassurance around portfolio investment strategy. ❗