



PRIVATE OCEAN CONTINUES TO BOLSTER EXECUTIVE TEAM WITH FEMALE LEADERS; NAMES CYNTHIA GREENFIELD AS CHIEF EXPERIENCE OFFICER

SAN RAFAEL, Calif. — June 1, 2020 — Private Ocean Wealth Management, a West Coast based wealth management firm, recently named Cynthia Greenfield to the newly created position of Chief Experience Officer, bolstering its overall female leadership to 54%.

The Chief Experience Officer (CXO) is a leadership role designed to apply Private Ocean’s values and Guiding Principles to enhance client and employee satisfaction. In communicating with clients, she will proactively solicit feedback on all aspects of their experience with the firm. She will also actively monitor and provide suggestions for enhancing all areas of the company that touch the client experience – from technology, communications, services, events, and more.

“One of the key differentiators for Private Ocean is our focus on heightening the customer and employee experience,” said Greg Friedman, CEO and Founder of Private Ocean. “Cynthia has long served in this role, as both an advocate for our clients and a work culture champion. She has led the way in developing many processes that set the standard for our industry and she has strengthened our relationships with our community partners. We are incredibly proud and fortunate to have her represent the firm as one of our executive leadership team.”

Cynthia combines over a decade of experience in the financial services industry with life coaching techniques to help advisors and clients build stronger relationships that lead to meaningful and goal-focused financial plans. She manages relationships with community partners and non-profit organizations, external vendors, and industry leaders and provides direction for all internal and external firm events. Internally, she helps implement best practices and provides overall management of large-scale projects related to technology integration, process development and others as needed.

To learn more, follow Private Ocean on Twitter [@_privateocean](https://twitter.com/privateocean).

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) combined two of the oldest privately-held wealth management firms in the San Francisco Bay Area. Founded by Richard Stone and Greg Friedman, the firm has locations in San Rafael, San Francisco, and Seattle.



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