



PRIVATE OCEAN NAMED A 2019 BEST PLACE TO WORK FOR FINANCIAL ADVISERS BY INVESTMENTNEWS

SAN RAFAEL, Calif. — April 1, 2019 — Private Ocean Wealth Management, a West Coast based wealth management firm, was named for the second year in a row by *InvestmentNews* as a Best Place to Work for Financial Advisers.

The second annual survey and recognition program is dedicated to identifying and recognizing advisory firms that encourage and inspire employees to provide their clients with the best possible investment and financial planning advice. Private Ocean, along with the other 74 winners, was chosen based on employer and employee surveys delving into everything from company culture, benefits, career paths and more.

“Fostering a healthy work and life balance is key to creating a culture that is supportive, flexible and aligned with our guiding principles,” said Susan Dickson, Chief Operating Officer at Private Ocean. “We are proud to be recognized again by *InvestmentNews* for our commitment to empowering our people to succeed while delivering the best possible service to our clients.”

All employees are eligible for a personal-goal-achievement bonus and given paid time off to help with disaster recovery efforts (the company also donates up to \$250 yearly to employees' favorite causes). Birthdays and work anniversaries are celebrated, the firm hosts a yearly "Family Weekend at the River," participates in beach cleanups (most recently at China Camp Village State Park) and holds two off-site retreats with team building activities.

“*InvestmentNews* is pleased to recognize firms with supportive cultures where advisers can thrive and are empowered to provide their clients with the best possible investment and financial planning advice,” said Suzanne Siracuse, CEO/Publisher, *InvestmentNews*. “They are role models for other firms in the industry who are striving to improve their own human resource policies and practices.”

To learn more about the *InvestmentNews* 2019 75 Best Places to Work for Financial Advisers, please go to InvestmentNews.com/BestPlaces and 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. The firm has over \$2 billion in assets under management and has locations in San Rafael, San Francisco, Walnut Creek and Seattle.

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