PRIVATE OCEAN NAMES SABRINA LOWELL AND KELLY KEYDEL AS MANAGING PARTNERS

SAN RAFAEL, Calif. — **January 29, 2020** — Private Ocean Wealth Management, a West Coast based wealth management firm, recently named Sabrina Lowell the Managing Partner of the San Francisco location and Kelly Keydel the Managing Partner of the Seattle location.

The Managing Partner is a leadership role designed to support, instill and facilitate Private Ocean's vision, objectives, communication, culture, as well as policies and procedures at each office. In addition to leading their teams, they will help drive the firm's business development efforts as well as focus on client satisfaction and retention.

"Sabrina and Kelly are outstanding leaders in their field and we are delighted to have them in these new roles," said Greg Friedman, CEO and Founder of Private Ocean. "They both epitomize our values and Guiding Principles and bring an incredible depth of experience and dynamic perspective in serving their clients. We look forward to their energy, enthusiasm, and commitment as we continue to evolve and expand our services."

Sabrina Lowell brings 17 years of experience in the San Francisco wealth management industry, helping clients build a solid framework for making informed financial decisions during times of transition. Paired with technical expertise, Sabrina brings the Certified Professional Co-Active Coach® (CPCC) designation to her work with clients via a systematic process of active listening, helping clients form and articulate goals, facilitating conversation, and discovering "a-ha" moments. She works with tech executives structuring equity compensation management strategies pre and post IPO, and as a newlywed, she enjoys working with career engaged couples to communicate openly about their finances and shared financial goals.

Kelly Keydel was a founding partner and co-owner of Lakeview Financial Group prior to the merger with Private Ocean. Kelly is incredibly proficient at analyzing complex financial situations and at assessing a client's unique financial behaviors. By bridging those two dimensions, she helps guide people to the decisions that are best for their lifestyle and their goals. In addition to her MBA and her CFP® designation, she also holds a Certified Divorce Financial Analyst (CDFA®) designation and works with many women and couples going through life transitions.

To learn more, follow Private Ocean on Twitter @_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 over $2.3 billion in assets under management as of December 31, 2019, and has locations in San Rafael, San Francisco, and Seattle.

Contacts

Private Ocean
Angela Giombetti
919.986.1074
angela.giombetti@privateocean.com