



PRIVATE OCEAN WEALTH MANAGEMENT NAMES STEVE BRANTON AS PARTNER

SAN RAFAEL, Calif. — May 13, 2020 — Private Ocean Wealth Management, a West Coast based wealth management firm, announced this week that advisor [Steve Branton](#) has been named a Partner.

"Steve is an incredible advisor and team leader who brings incredible intelligence and heart to serving our clients," said Greg Friedman, CEO and Founder of Private Ocean. "We are proud and honored to welcome Steve to the partnership and look forward to his continued contributions to Private Ocean."

Steve has worked in the financial planning field since 2007; he earned the CERTIFIED FINANCIAL PLANNER® designation in 2009, and joined the firm in 2011. Steve is an Accredited Domestic Partner Advisor (ADPA); he has received special training on the issues affecting non-traditional clients, such as unmarried couples, domestic partners or same sex couples, as well as the financial and legal issues related to marriage planning. Steve earned the Certified Co-Active Coach® (CPCC) credential. He received his training at the Coaches Training Institute (CTI), and is also accredited via the International Coach Federation as an Associate Credentialed Coach (ACC).

As an experienced Bay Area financial planner, Steve has been interviewed by the *Wall Street Journal*, *USA Today*, *Time*, the *San Francisco Business Times*, and other publications, and he writes articles on a variety of financial topics, including cross-border planning, crowdfunding, and marriage planning.

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. The firm has locations in San Rafael, San Francisco, and Seattle.

Contacts

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