The Women of Private Ocean
Wealth Management

Private Ocean

Private Ocean is a comprehensive wealth management firm with locations in San Rafael, San Francisco, and Seattle. Formed in 2009 as a union between two of the Bay Area's most innovative wealth advisories, we are deliberately structured to give clients the intimate experience of a small firm, while harnessing the power, depth and discipline of a much larger one. Our team seamlessly integrates personal financial planning and institutional-class investing.

Private Ocean's name is derived from a concept where an experience is deeply personal and the resources and opportunities are immense. That applies to our commitment to our clients and to our employees. We strive for excellence in all that we do and take great pride in a positive work culture that is both supportive and inclusive. We believe in recognizing and celebrating talent and offering opportunities for continued growth and education – and above all, we seek to empower people to best serve our clients and to make a difference in our communities.

On the following pages, we feature some of the incredibly talented and dedicated women of Private Ocean.

More than just a number*

54%

of total staff are women

60%

of leadership are women

2 MBA Credentials

6 CFP® Designations

3 CDFA® Professionals

Channing Olson

Director of Operations, Principal

“No matter how successful you are, change is always good. There can never be a status quo.” — Michael Lewis

Channing is responsible for ensuring the smooth and successful operation of the firm, and for designing policies and programs that make it a great place to work. She wears every hat and drives growth through operational efficiency and innovative cultural management. She contributes to all aspects of the business and every level of management, including: business strategy, organizational development, recruiting and HR, technology implementation, finance, legal, compliance, new business development, and marketing.

Sarah Wotherspoon, MS, CFP®, CDFA®

Director of Wealth Management, Principal

“I dwell in possibility.” – Emily Dickinson

As a financial advisor, Sarah creates portfolios for her clients with the objective of ensuring they have money to both reach their goals and last their lifetime. She believes that the best way to help people make smart financial decisions is by knowing who they are and what they want, and she takes great care to build trust and rapport with her clients. As the Director of Wealth Management, Sarah is responsible for ensuring the quality and consistency of financial planning advice to our clients across advisors, mentoring and training advisors as they progress through various stages of experience, helping structure and implement company initiatives and working with leadership in making Private Ocean’s technical and non-technical client advice and experience the best it can be.

Julie A. Back, CFP®

Advisor, Principal

“The secret of getting ahead is getting started.” – Mark Twain

Julie knows that managing wealth comes with its own brand of stress, one that is often exacerbated by a news cycle that makes people feel that they need to be constantly “doing something” with their investments. She counsels her clients to be educated and flexible, but also to be patient and understand why their behavior is the biggest contributor to their success.

B. Kelly Keydel, CFP®, MBA, CDFA®

Advisor, Managing Partner, Principal

“Planning is bringing forward the future into the present so you can do something about it now.” — Alan Lakein

Kelly believes that success in financial planning is a deeply personal thing. It takes hard work, discipline and often many years, but when a goal is realized, it can be a tremendously rewarding achievement. Kelly is a proud Pacific Northwesterner and athlete; She has successfully completed several marathons, including the NY Marathon. The discipline and commitment required to complete a marathon is similar to reaching an important financial goal, and so is the deep sense of personal accomplishment.

Lisa Peters, CFP®, CDFA®

Advisor, Principal

“What can we as advisors inspire in those we serve? — H. Peter Karroff

Lisa was an early pioneer in educating the legal community about the financial impact of divorce and in advocating the use of financial expertise during the divorce process. She has helped many clients recreate their financial, investment, and philanthropic plans following divorce, an inheritance, and other life transitions. She seeks to deliver the kind of experience that she would want from an advisor; an intentional focus on what is most important to the client, and a thoughtful, well-researched plan of action that is designed to evolve over time.

Sheila Schroeder

Business Development Officer

“Get it done by getting it started.”

Sheila Schroeder believes that financial empowerment equals freedom. Her mission is focused on helping clients reach financial independence, empowering women financially, and teaching financial literacy. Sheila joined the firm in 2015 with over 25 years of financial services experience, and believes that engaged relationships are forged through working together to create strategies and options so that clients can meet their personal and financial goals. In her free time, Sheila enjoys running (she has run the NYC Marathon three times), trying out the weekend recipes in the WSJ, Ravelry knitting, reading with her amazing book club, and travel.

Amanda C. Fox, MBA, CFP®

Advisor

“The greatest of all gifts is the power to estimate things at their true worth.”
— François de La Rochefoucauld

Amanda believes a thoughtful advisor helps you crystallize what matters most in life. She’s an outside partner who creates financial plans that hone in on your priorities, dreams, and moon shot goals. Real wealth is the opportunity to focus on life’s possibilities, and then act on it. Given Amanda’s background in start-up incubation, impact investing, and venture philanthropy, it’s no surprise that she loves working with business owners and anyone enthusiastic about the opportunity to use their capital, expertise or time to ignite positive change in the world.

Suzanne Williamson

Director of Client Services, Principal

Suzanne provides guidance and leadership for the Client Services team, ensuring that clients always experience exceptional service. She is focused on identifying better and more efficient ways to deliver on our commitment to our clients and our colleagues and she is passionate about helping people. Suzanne has been with Private Ocean since 2015 and was previously the VP of Operations and Compliance at Brouwer and Janachowski and the Operations Manager at Charles Schwab & Co. In her spare time, Suzanne enjoys hiking and listening to live music at one of the local venues in Marin.

Cynthia Greenfield

Chief Experience Officer, Principal

“Life shrinks or expands in proportion to one’s courage.”– Anais Nin

Cynthia is responsible for developing strategies that deliver on the firm’s mission, vision and guiding principles and enhances the employee and client experience through organization, communication and engagement. She 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. In her spare time, Cynthia enjoys hiking, fly fishing, skiing, cooking and sharing good food with family and friends.

Angela Giombetti

Director of Marketing

“Life’s like a movie, write your own ending. Keep believing, keep pretending.”
– Jim Henson

Angela oversees the firm’s marketing efforts and is focused on creating and evolving the firm’s brand as a forward-thinking leader in the RIA industry. She has dedicated her career to the financial services industry, having served in communications, change management, public relations and marketing roles in banking, B/D, fintech, and RIA firms across the country. She specializes in building holistic marketing and communications strategies that align with the firm’s goals, clearly communicate its value proposition through thought leadership content and collateral, and offer multiple interactive paths to engage with the firm. She is well-versed in all aspects of traditional and digital marketing and adept at navigating the unique challenges of marketing within a highly-regulated industry. Most recently, Angela worked for FiComm Partners, a marketing agency serving financial advisors and fintech firms. She has been with Private Ocean since 2018 and in her spare time is an accomplished social media personality and a ghost writer for multiple nationally published books.

Julie Penwell, CFP®

Advisor

"Hold yourself responsible for a higher standard than anybody expects of you. Never excuse yourself." - Henry Wade Beecher

Julie is a recent graduate of Central Washington University, where she received both a Bachelor in Business Administration specializing in Personal Financial Planning and a B.S. in Economics with a core focus on Business Forecasting and Analytics. Julie has long been a part of the Private Ocean team, first interning in our Seattle office in 2017 and then again in the summer of 2018. She strongly believes in pushing yourself outside of your comfort zone to pursue opportunities and experiences which enrich your learning capabilities as well as aptitude for leadership.

Elizabeth Pulido

Paraplanner

Elizabeth believes in building trusting relationships and collaborating with her team to establish the best outcomes for her clients. She is a problem solver who brings a combination of analytical skill and innovative thinking to her work, and she thrives on finding effective solutions that are as unique as the people she serves. Elizabeth previously worked in technology sales and is an experienced web developer. She is currently enrolled in the UC Berkeley Certificate Program in Personal Financial Planning.

Deborah Gibbs

Investment Operations Specialist

“In operations, as in finance, smart, early planning is the secret to having more flexibility later!"

Deborah is adept at juggling and reprioritizing a wide array of responsibilities and she’s always willing to step up and assist her colleagues and clients. Her background as a financial planning assistant makes her an invaluable contributor to almost every client relationship. She has also passed both the General Securities Representative (Series 7) exam and the Uniform Securities Agent State Law (Series 64) exam. She is relentlessly organized, but an adventurer at heart. If she’s not tending her lovely gardens at home, expect to find her exploring all across the US or sailing around the Caribbean.

Diane Cauchois

Portfolio Manager

“You can't hide what's in your heart." —The Green Mile

As a member of the Investment Operations team, Diane’s passion for numbers and sharp attention to detail is an incredible asset as she reviews and monitors client accounts. A transplant from Paris, France, she previously worked as a Junior Consultant in fund raising & development capital at Chausson Finance. Diane has been with Private Ocean since 2016.

The Women of Private Ocean Wealth Management

Leadership

Channing Olson
Director of Operations, Principal

Sarah Wotherspoon, MS, CFP®, CDFA®
Director of Wealth Management, Principal

Cynthia Greenfield
Chief Experience Officer, Principal

Suzanne Williamson
Director of Client Services, Principal

Angela Giombetti
Director of Marketing

Advisors/Planners

B. Kelly Keydel, CFP®, MBA, CDFA®
Managing Partner, Advisor, Principal

Julie Back, CFP®
Advisor, Principal

Lisa Peters, CFP®, CDFA®
Advisor, Principal

Amanda Fox, MBA, CFP®
Advisor

Sheila Schroeder
Business Development Officer

Julie Penwell, CFP®
Advisor

Elizabeth Pulido
Paraplanner

Investments

Diane Cauchois
Portfolio Manager

Deborah Gibbs
Investment Operations Specialist

Client Services

Karolina Chernyak
Senior Client Service Specialist

Melissa Restivo, FPQP®
Client Service Specialist

Petra Braaksma
Senior Client Service Specialist

Rokhand Collins
Client Service Specialist

Courtney Roberts
Office Coordinator

Operations

Heather Martin
Systems Administrator and Trainer

Marla Mulligan
Office Manager

Private Ocean

*As of November 15, 2021

For more information, visit privateocean.com