

Your future looks bright.

Let's plan it.

DIVE IN

Your Personal Financial Journey

No matter what life throws your way, our advisors are here to guide you through all important phases of your life. **How can we help?**

RETIREMENT PLANNING

[VIEW MORE](#)

OWNING A BUSINESS

ESTATE PLANNING

WANT TO DIVE DEEPER?





What We Do

Whether you're starting out or somewhere mid-journey, you can have it all — a reassuring financial plan and an innovative investment strategy.

PLANNING

INVESTING

Meet Your Team

From our most seasoned advisors to our client service and operations professionals, everyone on the Private Ocean team is here to serve you.

OUR PEOPLE

Recent Articles

The Private Ocean team offers its perspective on the latest news, trends and happenings in our industry and communities.

Happy Independence Day From Private Ocean

Jul 3, 2019

By **Greg Friedman** - Founder & Chief Executive Officer

Wealthspan: Strategies to Protect Your Wealth at Every Stage of Your Life

Jul 1, 2019

By **Steve Branton** - Advisor

Identity Theft: The Importance of Freezing Your Credit

Jun 27, 2019

By **Kevin Gahagan** - Advisor, Principal

[READ MORE](#)

Let's Talk

Do you like the idea of high-powered life planning and investment management in a relaxed, friendly setting? If you do, we should sit down and learn more about each other.

First Name*

Last Name

Email*

Phone

Preferred Method of Contact

Questions or Comments



SUBMIT

Experience

Contact

Culture

FAQs

Perspectives

Client Login



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