

# WE PRESERVE, GROW AND PERPETUATE CLIENT ASSETS

## WE OFFER INDIVIDUALIZED INVESTMENT STRATEGIES AND SOLUTIONS FOR CHANGING OPPORTUNITIES



### OUR FIRM

As an innovative and independent advisory firm, Mission Creek provides institutional and private clients specialized investment and planning strategies and solutions.



### OUR SERVICES

Our clients come first. We create customized investment and planning strategies focused on customized institutional services and private wealth management.



### OUR APPROACH

Clients' objectives are integrated with risk management, tax minimization and reduced implementation costs to create individualized solutions.



### LEAD TEAM

Our de  
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market

## WHAT WE DO

Our differentiated investment and advisory services include individualized wealth management and planning, private equity distribution management, and concentrated stock transition strategies and solutions.

RIGOROUS INVESTMENT APPROACH	RISK MANAGEMENT
MINIMIZE IMPLEMENTATION COSTS AND TAXES	DIRECT AND OPEN COMMUNICATION



# THE MISSION CREEK ADVANTAGE

**DEDICATED  
TEAM**

**EXCEPTIONAL CLIENT  
SERVICE AND ACCESS**

**UNCONFLICTED, FULLY  
INDEPENDENT PLATFORM**

**CUSTOMIZED  
STRATEGIES**

**FIDUCIARIES**

**RISK  
MANAGEMENT**

**EFFECTIVE TAX  
MANAGEMENT**

**ISOs, NSOs AND  
RESTRICTED STOCK EXPERTISE**

**CONCENTRATED STOCK  
MANAGEMENT**

## NEWS & UPDATES

### **Case for Cutting Rates Can Be Found in Close Calls of the 1990s**

Fed officials at their meeting this week are set to weigh whether trade tensions and a recent hiring slowdown might warrant action

[READ MORE](#)

(<https://www.wsj.com/articles/case-for-cutting-rates-can-be-found-in-close-calls-of-the-1990s-11560715200>)

### **As China Tariffs Loom, Some U.S. Companies Say Buying American Isn't an Option**

Business owners struggling to find alternatives to Chinese imports urge Trump administration to drop tariff plans

[READ MORE](#)

(<https://www.wsj.com/articles/as-china-tariffs-loom-some-u-s-companies-say-buying-american-isnt-an-option-11560677402>)

### **Race to Public Markets Continues Despite Uber, Lyft Flops**

Strong anticipated demand for Slack signals robust investor appetite; 2019 still expected to be a record

[READ MORE](#)

(<https://www.wsj.com/articles/race-to-public-markets-continues-despite-uber-lyft-flops-11560684604>)

## GET IN TOUCH

If you have questions, would like more information, or would like to schedule a call or meeting.

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