

Helping **navigate** life's  
complexities, so you can  
focus on **what truly matters.**

trust, passion and **freedom from the herd.**

As a 100% employee-owned wealth management firm, we have an unwavering focus on the success of our clients. Our belief is simple: **Clients come first.** This belief drives everything we do.

[VIEW OUR TEAM \(/OUR-TEAM\)](#)

## Why We're **Different**

Many firms specialize in either **Wealth Management** or **Investment Management**. We combine both services to provide each client with a customized plan specifically tailored to meet their financial goals.

Have you thought about

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how to increase your  
cash flow in  
retirement?

# Things to consider



## FREESTONE NEWS

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Freestone Future  
Leaders Scholarship  
Winners  
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updates/news/get-to-  
know-our-2019-  
freestone-future-  
leaders-scholarship-  
winners)

## FINANCIAL PLANNING

Protecting Your  
Business from the  
Unexpected  
(/blog/news-and-  
updates/planning/protecting-stock-positions)  
your-business-from-  
the-unexpected)

## FINANCIAL PLANNING

Concentrated Stock  
Positions  
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