



Unique Expertise and Specialty in Municipal Bonds

Safe and tax-free income should be an important part of a successful family's investment plan. We have directed class-leading results.

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About Creekside Partners

Creekside is an independent, boutique wealth management firm based in San Francisco Bay Area. We provide intelligent, thoughtful advisory and investment services to a select group of clients.

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Our Expertise

With nearly 30 years experience with California municipal bonds, we are extremely proud of the results we have delivered in this often misunderstood asset class. In balanced accounts owning stocks and bonds, we strive to keep fees, risks and taxes low.

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Investor's Learning Tools

We regularly write and publish timeless articles about investing and financial planning, some of which is available only here and some of which has appeared in the media.

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Visit Our Office

775 Baywood Drive, Suite 306
Petaluma CA 94954
(707) 769-0200

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Protect & Grow your Wealth

Our clients are of all ages and stations in life — from young entrepreneurs and professionals who are still setting aside savings, to retirees seeking to enjoy the fruits of their professional success. In either case, our clients recognize the need to have a centralized, coordinated investment plan in order to control risk while seeking strong returns.

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