



## Mitch Katzer, CFP®

CLIENT ADVISOR

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Before joining the Freestone team in early 2015, Mitch spent four years at Fisher Investments where he held positions in portfolio analytics and reporting, sales analytics, and client service. At Freestone, Mitch worked for one year with the Operations Team as an Analyst focusing on large projects such as the implementation of new client facing systems. After that, he spent two years on the Morgan Team as a Client Manager, serving high net worth individuals and families. Mitch is now using his experience as a member of the Client Advisor Team.

### Education

Mitch earned his BA in Business Administration (Finance) from the University of Washington's Michael G. Foster School of Business. At the Foster School, he was awarded the University Scholarship and participated in the Dow Dawgs Finance Association and the Business Undergrads in Leadership Development (BUILD) programs. Mitch holds the CERTIFIED FINANCIAL PLANNER™ (CFP®) designation.

### Outside Freestone

Being a Pacific Northwest native (born in Portland, OR), Mitch spends much of his time outside the office with nearby family and friends. He enjoys staying active by jogging, hiking around the Northwest, and playing sports. Mitch also invests time in charities, keeps up with his sports teams, continues to learn via books and podcasts, and explores the local food, drink, and music scene.