



Nick Bucklin, CFA®

BUSINESS DEVELOPMENT AND CLIENT ADVISOR

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Nick joined Freestone after working for 13 years at Franklin Templeton Investments, where he was a Vice President and Portfolio Manager. At Franklin, Nick managed a variety of fixed income portfolios. He was responsible for the trading and day-to-day management of customized separate accounts for high net worth individuals and institutions, mutual funds, and exchange traded funds. It was early in his career as a part of the Private Client Group where Nick developed his passion for helping clients. He went on to manage tax-free mutual funds and launch the firm's first actively managed municipal bond ETF. Nick also managed customized portfolios for large, international institutional clients. In 2019, he launched the industry's first dedicated municipal Green Bond strategy.

Nick is based out of the San Francisco office where he is focused on providing comprehensive wealth management to clients. He also assists in coordinating relationships with strategic business partners, including accounting, legal, and other professional services firms.

Education

Nick earned his MBA from UC Berkeley, Haas School of Business and a BA from Boston College. He holds the Chartered Financial Analyst (CFA®) designation.

Outside Freestone

Nick enjoys spending his free time with his wife and two children, preferably somewhere outside. When not working, he can be found surfing, fly-fishing, skiing, or backpacking across California and the American West. Nick serves on the Future Montana Committee, an adjunct board group for the Montana Land Reliance, a land conservation organization. Being a San Francisco native, Nick is a life-long Giants, 49ers, and Warriors fan.

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