



# Peter Wicklund, CFA®, CFP®

CLIENT ADVISOR

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Peter joined Freestone's Client Advisor team in 2003. Peter works closely with clients to identify goals, develop plans and navigate investment solutions to ensure financial success. Prior to joining the firm, he served as Vice President at Merrill Lynch providing comprehensive wealth management services to affluent families and advising company profit sharing plans. Peter began his career as an officer in U.S. Bank's trust department, where he managed personal and corporate trust relationships throughout the PNW region.

## Education

Peter earned a BA in Business Administration, Finance from the University of Washington. He holds the Chartered Financial Analyst (CFA®) and Certified Financial Planner (CFP®) designations.

## Outside Freestone

Peter is a member of the Seattle Society of Financial Analysts and has served on several non-profit boards in the Seattle community. Outside the office, he raises money for charities through his cycling foundation and frequents Sun Valley, ID where he actively enjoys outdoor pursuits with his family.