



## Andrew Erisman, CIMA®

CLIENT ADVISOR / FIRM MANAGEMENT

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"I'm just 'bout that action, boss."

- Marshawn Lynch, Seattle Seahawks Super Bowl XLVIII

"Ultimately, you hire a professional advisor to help you get things done that you otherwise do not have the interest, time, or expertise to handle yourself. It is not enough to understand the decisions to be made, you need to evaluate your options and take action." - Andrew Erisman

Andrew joined Freestone's Client Advisor team in May of 2009 and works directly with the firm's individual and small institutional clients. Prior to Freestone, he spent 18 years providing comprehensive wealth management solutions to high net worth families and endowments at Oppenheimer & Co. Inc., where he began his investment career in 1991. Andrew enjoys guiding clients through complex wealth management issues that come with large estate or legal settlements, endowment and fiduciary trust accounts, and executive benefits such as stock options, restricted stock and deferred compensation plans.

## Education

Andrew earned a BA in Political Science from the University of Washington in 1991 and holds the Certified Investment Management Analyst (CIMA®) designation through the Investment Management Consultants Association (IMCA®) and the Wharton School of Business at the University of Pennsylvania.

## Outside Freestone

Investment Management Consultants Association® (IMCA®) is the owner of the certification marks "CIMA®", "CPWA®", "Certified Investment Management Analyst®," and "Certified Private Wealth Advisor®." Use signifies that the user has successfully completed IMCA's initial and ongoing credentialing requirements for certification.



Andrew currently serves on the Bellevue Christian School Trust & Investment Committee. He lives in Yarrow Point, Washington with his wife Stacy and two boys. He enjoys spending time with his family at their cabin in Leavenworth and stand up paddle boarding (SUP) on the Wenatchee River and on Lake Washington.