



Bob Mellon, CPWA®

CLIENT ADVISOR

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Bob joined Freestone in 1999 as one of its five founding members. As an advisor to some of Freestone's largest client relationships, Bob provides advice and counsel to high net worth individuals and families on complexities that inevitably arise with financial success. Bob began his career with U.S. Bank, subsequently joining Smith Barney's Consulting Group (now Morgan Stanley) to provide investment management consulting services to primarily institutional clients with assets totaling approximately \$1 billion. He has also served as a member of the Boards of Directors for Fortune Bank and New Futures and is currently a member of the Corporate Council for The 5th Avenue Theatre. Bob is passionate about helping other entrepreneurs realize their vision, actively investing in many Pacific Northwest startups.

Education

Bob earned a BA in Finance from Portland State University and holds the Certified Private Wealth Advisor (CPWA®) designation.

Recognition

Bob has been recognized by *Barron's* as one of the top Financial Advisors in Washington State from 2011-2013, and again from 2016-2020. Barron's also ranked Bob as one of the top 100 Independent Financial Advisors in the country from 2010-2013.

Outside Freestone



A northwest native, Bob currently resides in Washington wine country in Woodinville, Washington and enjoys coaching youth sports, hiking, camping and traveling with his wife Abby and their three children.