

Creekside Partners

A California Corporation

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March 31, 2011

This brochure provides information about the qualifications and business practices of Creekside Partners. If you have any questions about the contents of this brochure, please contact us at the telephone number and/or e-mail address above. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or any state securities authority.

Creekside Partners is a registered investment advisor. Registration of an investment advisor does not imply any level of skill or training. The verbal and written communications of an investment adviser provide you with information you need to determine whether to hire or retain the advisor. Additional information about Creekside Partners is also available on the SEC's website at www.adviserinfo.sec.gov.

Item 2

Material Changes

In March 2011, Creekside Partners completed a name change from Creekside Partners Investment Counsel LLC to Creekside Partners. The company also changed its legal structure from a California Limited Liability Company to a California Corporation.

In July, 2010, the Securities and Exchange Commission (“SEC”) adopted revised rules regarding the format and content of the Form ADV Part 2 disclosure document. This Firm Brochure, dated March 31, 2011, has been prepared according to the SEC’s new rules and requirements. It is a narrative that is substantially different in form and content from earlier versions and includes some new information that we were not previously required to disclose.

After our initial filing of this Firm Brochure, this section will be used to provide our clients and prospective clients with a summary of new and/or updated information. We will inform you of the revision(s) based on the nature of the updated information.

Consistent with the new rules, we will ensure that you receive a summary of any material changes to this and subsequent Firm Brochures within 120 days of the close of our fiscal year. Furthermore, we will provide you with other interim disclosures about material changes as necessary.

You may request a complete copy of our Firm Brochure at any time by contacting us at 925.284.1260 or info@creeksidepartners.com.

ITEM 3 TABLE OF CONTENTS

Item 1: Cover Sheet

Item 2: Material Changes

Item 3: Table of Contents

Item 4: Advisory Business

Who we are

Services we offer

Assets under management

Item 5: Fees and Compensation

Fee Schedule

Other Costs Involved

Item 6: Performance-Based Fees and Side-By-Side Management

Item 7: Types of Clients

Item 8: Methods of Analysis, Investment Strategies and Risk of Loss

Item 9: Disciplinary Information

Item 10: Other Financial Industry Activities and Affiliations

Item 11: Code of Ethics, Participation or Interest in Client Transactions and Personal Trading

Code of Ethics

Personal Trading for Associated Persons

Item 12: Brokerage Practices

Selection of Brokers

Aggregation of Orders

Directed Brokerage

Item 13: Review of Accounts

Item 14: Client Referrals and Other Compensation

Item 15: Custody

Item 16: Investment Discretion

Item 17: Voting Client Securities

Item 18: Financial Information

Principal Executive Officers and Management Persons

ITEM 4: ADVISORY BUSINESS

Who we are

Creekside Partners (referred to as “we,” “our,” “us,” or “Creekside”), has been registered as an investment advisor since April 2003. Our Principals are Richard Ashburn Jr. and Andrew Hempeck.

Services we offer

We provide investment management services to our clients primarily on a discretionary basis. These services include:

- The development of a roadmap or benchmark based on each client’s unique circumstances, including the client’s financial status, investment objectives, and degree of risk tolerance.
- The design of an appropriate asset allocation across available asset classes and markets based on the client’s goals.
- The selection of individual investments within each asset class. Such investments may include stocks and corporate bonds, treasury and municipal bonds, exchange traded funds, mutual funds. Certain other investment vehicles may be considered based on the unique circumstances of each client.
- The ongoing monitoring and maintenance of the investment plan. Such maintenance includes

periodic portfolio adjustments to reflect changes in client circumstances, market conditions and relative investment opportunities.

- The periodic reporting of the portfolio and investment results.

In providing its services, the standard of care imposed upon Creekside shall be to act with the care, skill, prudence and diligence under the circumstances then prevailing that a prudent person acting in a like capacity and familiar with such matters would use in the conduct of an enterprise of a like character and with like aims.

Creekside is a fee-only Registered Investment Advisory firm dedicated to building and protecting wealth for high net worth individuals. Our investment process combines classic asset allocation techniques with analysis of current conditions in the macro economy, the financial markets both domestically and internationally and the political environment. We emphasize risk assessment and control to lower the volatility of our client's investment portfolios.

Our commitment is to provide excellent investment management with the highest levels of personal service. The relationship between Creekside and our clients is among the most important assets of our firm and we strive to maintain our clients' trust and confidence. In addition to solid investment guidance, we are dedicated to frequent communication, rapid responsiveness to client requests and the highest degree of ethical behavior.

We focus on what we are good at – providing investment advice – and make recommendations to clients to retain other expert advisers in specific fields such as legal advice, tax advice, estate and trust planning, private banking and insurance services. We help our clients organize their financial lives through creation advisers to develop a personalized, cohesive investment plan for each client.

In addition to providing investment management advice, Creekside is committed to maintaining a client centered culture where attention to detail and responsiveness to clients are equally important to the investment plan. The following services are part of our asset management relationship with our clients:

- Development of Investment Strategy & Creation of an Asset Management Plan
 - Assessment of assets, liabilities, and generation of income
 - Development and articulation of investment objectives
 - Assessment of risk tolerance
 - Design of strategic asset allocation across multiple asset classes
- Implementation of the Asset Management Plan: the Investment Process
 - Ongoing economic, financial market & asset class research
 - Development of intermediate term tactical asset allocation
 - Evaluation and selection of investment vehicles & managers
- Quarterly Results Measurement & Analysis
 - Quarterly portfolio reports
 - Ongoing periodic capital market assessment
- Collaboration with Client's Tax, Legal, Private Banking and Insurance Advisers
 - Provide recommendations to trusted advisers as requested
 - Coordination of flow of relevant information

- Integration of other advisers into investment planning as requested
- Evaluation of Concentrated Stock Positions & Options
 - Monitor existing positions
 - Development of diversification strategies
 - Development of exit strategies
- Cash Flow & Liquidity Management
- Investment Account Consolidation and Set-Up
 - Establishment of accounts
 - Seamless transition from legacy accounts
 - Follow-up with custodians

We provide an integrated and customized approach to asset management. We recognize our clients as unique individuals with diverse financial goals and needs. We begin each relationship with a thorough review of the client's assets, liabilities, income level and financial potential. We spend considerable time understanding the client's goals, assessing their tolerance for risk, and educating them with regard to what are reasonable expectations in today's investment environment. Through thoughtful analysis, we develop a personalized investment program that addresses the unique requirements of the individual.

While no clients currently do so, clients may request that certain securities or investments not be purchased in their accounts. In addition, clients may have certain legacy portfolio holdings that they would like to retain even if those positions would not otherwise be held in Creekside portfolios. We do not provide portfolio management services to a wrap fee program.

Assets under management

As of May 31, 2011, we manage assets of \$86,300,000 on a discretionary basis and \$21,000,000 on a non-discretionary basis.

ITEM 5: FEES AND COMPENSATION

Fee Schedule

Fees for investment supervisory services are billed as of the end of each quarter, calculated on the value of assets under management as of the last day of the calendar quarter. Fees are based on the following schedule:

Account Value		Annual Fee
On the first	\$2,500,000	1.00%
On the next	\$2,500,000	0.80%
On amounts >	\$5,000,000	0.50%

Creekside believes its fees are reasonable and competitive in the marketplace in which it serves. In limited instances, Creekside may consider negotiating fees depending upon the circumstances involved. For example, if a client's assets are particularly large, or if a client seeks limited services, and if Creekside believes that it would be profitable to do so, the firm may be willing to negotiate fees or fee structure. In any event, Creekside would evaluate fees and fee structure relative to the nature of the client and the intensity of the services expected to be provided.

We generally require that you provide authorization for us to deduct our fees directly from your investment account. Important information about the deduction of management fees:

- You must provide authorization for us to pull fees by initialing the appropriate section of our contract.
- You will receive a statement from the custodian each quarter which lists our fees and the amount requested as payment for investment advisory services from the custodian.
- You will receive a statement from your custodian which shows your holdings.
- You are responsible for reviewing the accuracy of the fees being billed, as the custodian will not do so.

In limited circumstances we may agree to allow clients to pay by check rather than deducting payment directly from the client account.

You may terminate our advisory relationship at any time by providing written notice. We will prorate the advisory fees received through the termination date.

We may terminate our relationship with a client by providing written notice to the client.

Other Costs Involved

In addition to our advisory fee shown above, you are responsible for paying fees associated with investing for your account. These fees include:

- management fees for ETFs and mutual funds. These are fees charged by the managers of the ETF or mutual fund and are a portion of the expenses of the ETF or mutual fund.
- brokerage costs and transaction fees for any securities or fixed income trades. These are generally charged by your custodian and/or executing broker.

Additional information about brokerage costs and services is provided in “Item 12: Brokerage Practices.” We believe the fees mentioned above are competitive; however you may be able to obtain similar services from other sources at a lower price.

ITEM 6: PERFORMANCE-BASED FEES AND SIDE-BY-SIDE MANAGEMENT

We do not receive performance fees for managing accounts. (In the past Creekside managed a fund which had a performance fee, but we no longer recommend clients to invest in the fund. The fund invested in non-public venture capital companies and had a performance fee of 10% based on a profitable exit.)

ITEM 7: TYPES OF CLIENTS

Creekside's clients include individuals, families, trusts, estates, corporations and/or other business entities, and company retirement plans.

Generally we require that you maintain \$1,000,000 under management with us. However, we may waive that minimum at our sole discretion.

ITEM 8: METHODS OF ANALYSIS, INVESTMENT STRATEGIES AND RISK OF LOSS

The investment process employed at Creekside is an outgrowth of the work we developed and implemented at a previous firms and experience since 1985. We are value driven and observe the economy and asset class and valuation analysis to identify areas within the markets that are more or less attractive at a particular time. The goal of this process is to create a portfolio for each client with superior risk/reward characteristics.

Overview of the Process. We conduct investment research on an ongoing basis. Our investment process consists of five distinct steps:

- 1) Economic trend analysis
- 2) Asset class, market and sector analysis
- 3) Portfolio design
- 4) Investment vehicle and manager selection
- 5) Portfolio management

By combining our insights regarding economic trends with our work on asset class attractiveness levels, we are able to form a mosaic of the current investment environment (steps 1 & 2). Based on prevailing investment conditions, we identify the asset classes to over-weight and under-weight within the portfolio, which yields an intermediate term tactical asset allocation for portfolio design (step 3). We then evaluate and select appropriate investment vehicles and managers for each asset class (step 4). On an ongoing basis, we carefully monitor the results of the investment program, provide quarterly reports to our clients and consider where changes may be appropriate (step 5). Each of these steps is described in greater detail in the following paragraphs.

Step 1 – Economic Trend Analysis.

Our analysis does not endeavor to forecast specific economic levels such as GDP growth, inflation rates, or unemployment; rather, our goal is to monitor broad economic trends and to identify changes in direction of those major trends. Opportunities to enhance risk adjusted investment returns can be available when the economic environment is shifting due to the close link between the financial markets and the economy.

Step 2 – Asset Class, Market & Sector Analysis. We study the valuation levels and fundamental trends of asset classes, markets and sectors. We seek to identify areas of over- and under-valuation within the markets by comparing current valuations across sectors and relative to historical levels. We also review

the attractiveness of asset classes, markets and sectors based on fundamental factors and trends. We seek to identify those areas of rising opportunity (e.g., lower relative valuations and/or improving fundamentals) and rising risk (e.g., higher relative valuations and/or deteriorating fundamentals). We utilize both internal research and external sources to complete our asset class, market and sector work.

Step 3 – Portfolio Design. We integrate the results of our economic work with our asset class, market and sector analysis to form a view of which areas in the markets are more or less favorable for investment at a particular point in time. Market phases of relative over and under valuation can continue for long periods, often reversing only after a change in the macro environment. In this context, we use our fundamental and valuation work to identify opportunities. We seek to exploit these insights to take advantage of positive changes not reflected in prices (i.e., fat pitch opportunities) and to reduce exposure to negative changes not reflected in prices (i.e., risks). Based on the relative attractiveness of the various asset classes, we establish an intermediate term tactical asset allocation for the portfolio, which will fall within the goals of the client.

Step 4 – Investment Vehicle & Manager Selection. Once we have determined the appropriate intermediate term tactical asset allocation for the portfolio, we select investment vehicles and managers for each asset class. The appropriate investment vehicle may be a passive index product if the market is highly efficient and if tax and cost considerations are paramount. Alternatively, we may use active managers if we believe that active management may generate superior results. Where active managers are used, we carefully evaluate the universe of managers and select those exhibiting superior traits. We use internal and external sources to evaluate investment vehicles and managers.

Step 5 – Portfolio Management. Once the client's assets are invested, we carefully monitor the portfolio and analyze the results on a regular basis. We analyze portfolio performance relative to market action of the various asset classes, markets and sectors. We evaluate investment manager performance relative to their benchmarks and to competitor results. Our analytical reviews feed back into our investment process on an ongoing basis. The investment process on an ongoing basis.

The investment process at Creekside Partners is continuous. We conduct research on an ongoing basis and actively seek to identify solid investment opportunities for our clients. We are long term investors and as our process unfolds over time, we seek to position our clients well relative to the dynamic economy and investment environment.

Creekside's investment strategy is based on strategic and tactical asset allocation techniques and generally involves the purchase of mutual funds, index funds, exchange traded funds and other pooled investment vehicles across a range of asset classes, including, among others, equities and fixed income.

Stocks and equity investments involve significant risk of capital loss in the event of company-specific, sector-specific, geography-specific or general stock market declines. Equity investments can be highly volatile.

Bonds and fixed income investments also carry risk of capital loss. Fixed income investments involve both interest rate risk (the risk that general interest rates rise, which causes the value of existing fixed income securities to decline) and default risk (the risk that a security issuer defaults, which causes the value of the affected securities to decline). Accordingly, fixed income investments can lose value and be volatile.

Creekside's investment strategy involves the use of tactical asset allocation techniques where certain asset classes or categories may be over- or under-weighted relative to a client's long term strategic asset allocation target. Such over- or under-weights may cause underperformance relative to that which may be generated by simply holding the weights in the long term strategic asset allocation target.

Creekside bases its tactical asset allocation decisions on valuation analysis and asset class, market and sector analysis. There is no guarantee that Creekside's analysis will be correct or that tactical asset allocation decisions will lead to improved performance. There is a risk that tactical asset allocation decisions may lead to underperformance and/or investment losses.

All investments involve different degrees of risk. You should be aware of your risk tolerance level and financial situations at all times. We cannot guarantee the successful performance of an investment and we are expressly prohibited from guaranteeing accounts against losses arising from market conditions.

ITEM 9: DISCIPLINARY INFORMATION

Registered investment advisors are required to disclose any material facts regarding any legal or disciplinary actions that would be material to your evaluation of the investment advisor and each investment advisor representative providing investment advice to you. We have no information of this type to report.

ITEM 10: OTHER FINANCIAL INDUSTRY ACTIVITIES AND AFFILIATIONS

As a registered investment advisor, we are required to disclose when Creekside or our principals has any other financial industry affiliations. Neither Creekside nor our principals has affiliations of this type to report.

ITEM 11: CODE OF ETHICS, PARTICIPATION OR INTEREST IN CLIENT TRANSACTIONS AND PERSONAL TRADING

Code of Ethics

We have adopted a set of enforceable guidelines (Code of Ethics), which describes unacceptable conduct by Creekside and our associated persons. Summarized, this Code of Ethics prohibits us from:

- placing our interests before yours,
- using non public information gathered when providing services to you for our own gains, or
- engaging in any act, practice or course of business that is, or might be considered, fraudulent, deceptive, manipulative, or in violation of any applicable law, rule or regulation of a governmental agency.

Please contact us if you would like to receive a full copy of this Code of Ethics.

Personal Trading for Associated Persons

We may buy or sell some of the same securities for you that we already hold in our personal account. We

may also buy for our personal account some of the same securities that you already hold in your account. It is our policy not to permit our associated persons (or their immediate relatives) to trade in a way that takes advantage of price movements caused by your transactions.

We may restrict trading for a particular security for our accounts or those of our associated person if there is a pending trade in that security in a client account. Trades for our accounts (and those of our associated persons) will be placed after client trades have been completed. When our trades are placed after our client trades, we may receive a better or worse price than that received by the client.

Creekside and its associated persons may purchase or sell specific securities for their own account based on personal investment considerations without regard to whether the purchase or sale of such security is appropriate for clients.

All persons associated with us are required to report all personal securities transactions to us quarterly.

ITEM 12: BROKERAGE PRACTICES

Selection of Brokers

In selecting or recommending brokers to execute portfolio transactions, we make a good faith judgment about which broker would be appropriate. We take into consideration not only the available prices and rates of brokerage commissions, but also other relevant factors that may include (without limitation):

- the execution capabilities of the broker/dealer,
- research (which may include economic forecasts, investment strategy advice, fundamental and technical advice on individual securities, valuation advice and market analysis),
- custodial and other services provided by the broker/dealer that are expected to enhance our general portfolio management capabilities,
- the size of the transaction,
- the difficulty of execution,
- the operational facilities of the broker-dealers involved,
- the risk in positioning a block of securities, and
- the quality of the overall brokerage and research services provided by the broker/dealer.

Creekside has an arrangement with Charles Schwab and Company and Fidelity Brokerage Services LLC (collectively, and together with all affiliates, "Fidelity") through which Charles Schwab and Fidelity provides Creekside with "institutional platform services." The institutional platform services include, among others, brokerage, custody, and other related services. Fidelity's institutional platform services that assist Creekside in managing and administering clients' accounts include software and other technology that (i) provide access to client account data (such as trade confirmations and account statements); (ii) facilitate trade execution and allocate aggregated trade orders for multiple client accounts; (iii) provide research, pricing and other market data; (iv) facilitate payment of fees from its clients' accounts; and (v) assist with back-office functions, recordkeeping and client reporting.

Creekside is independently operated and owned and is not affiliated with Charles Schwab or Fidelity.

Charles Schwab and Fidelity generally do not charge their advisory clients separately for custody services but are compensated by account holders through commissions and other transaction-related or asset-based fees for securities trades that are executed through Charles Schwab or Fidelity or that settle into Charles

Schwab or Fidelity accounts (i.e., transactions fees are charged for certain no-load mutual funds, commissions are charged for individual equity and debt securities transactions). Charles Schwab and Fidelity provide access to many no-load mutual funds without transaction charges and other no-load funds at nominal transaction charges.

When we select the broker/dealer for a transaction, we may cause you to pay a higher commission for effecting a transaction than another broker/dealer would have charged for effecting that transaction. We do this if we determine in good faith that the amount of the commission is reasonable in relation to the value of the brokerage and research services provided by the broker/dealer. The determination is viewed in terms of either the particular transaction or our overall responsibilities to you.

Aggregation of Orders

Creekside does not aggregate client orders for purchase or sale transactions. When a particular purchase or sale of a specific security or fund applies to multiple clients, when possible Creekside seeks to execute the transactions at, or about, the same time for all applicable clients. In general, investment vehicles purchased for clients consist of a combination of index funds, exchange traded funds, actively managed mutual funds, and other pooled investment vehicles. For these pooled investment vehicles, there is no transaction cost advantage to aggregating orders. Individually managed separate accounts may be utilized for certain clients, in which case the sub-adviser may or may not aggregate client orders.

Directed Brokerage

You may instruct us to execute any or all securities transactions for your account with or through one or more broker/dealers designated by you. In these cases, you are responsible for negotiating the terms and conditions (including, but not limited to, commission rates) relating to all services to be provided by the broker/dealers and you are satisfied with the terms and conditions. We have no responsibility for obtaining the best prices or any particular commission rates for transactions with or through the broker/dealer in these situations. You recognize that you may not obtain rates as low as you might otherwise obtain if we had discretion to select broker/dealers other than those chosen by you. If we believe, in our exclusive discretion, that it cannot satisfy its fiduciary duty of best execution by executing a transaction for your account with a broker/dealer designated by you, we may execute that transaction with a different broker/dealer. If you would like us to cease executing transactions with or through the designated broker/dealer you must notify us in writing.

ITEM 13: REVIEW OF ACCOUNTS.

Mr. Ashburn and Mr. Hempeck review accounts on at least a quarterly basis to determine whether portfolio investments and corresponding asset allocation percentages are consistent with the goals and objectives outlined during the information gathering phase of the new client process. They conduct portfolio reviews in the context of prevailing economic, market and general conditions at the time of review. Any major variances from the portfolio's goals or policies will trigger a more extensive review of the portfolio and could lead to portfolio changes.

In addition to the regularly scheduled reviews outlined above, accounts are reviewed periodically based on: (1) a change in client circumstances (e.g., inheritance, career change, marriage/divorce, home purchase, etc.), (2) a major shift in securities markets, or (3) significant tax law or regulatory changes. Creekside depends on clients to notify the firm in the event of changes in the client's circumstances.

Clients typically receive an Asset Allocation report showing the broad allocation of their investment holdings across asset classes, a Portfolio Summary report detailing specific portfolio holdings within the client's consolidated accounts, a Performance report showing performance for the previous quarter of the client's accounts. Other additional reports may be provided to particular clients depending upon the circumstances.

ITEM 14: CLIENT REFERRALS AND OTHER COMPENSATION

Charles Schwab and Fidelity also offer other services intended to help Creekside manage and further develop its advisory practice. Such services include, but are not limited to, performance reporting, financial planning, contact management systems, third party research, publications, access to educational conferences, roundtables and webinars, practice management resources, access to consultants and other third party service providers who provide a wide array of business related services and technology with whom Creekside may contract directly.

We may also engage solicitors to provide client or investor referrals. Creekside does not currently engage any solicitors, but if we were to, those solicitors would be paid a portion of the fees we earn for managing the client or investor that was referred. If you are referred by a solicitor, this practice will be disclosed in writing and we will comply with applicable rules or statutes.

ITEM 15: CUSTODY

If you give us authority to deduct our fees directly from your separately managed account, we have custody of those assets. In order to avoid additional regulatory requirements in these cases, we follow the procedures outlined in "Item 5: Fees and Compensation." You will also receive quarterly statements directly from custodian of the account that details all transactions in the account.

ITEM 16: INVESTMENT DISCRETION

You may provide discretionary authority for us to manage your assets. Discretionary authority means that you are giving us a limited power of attorney to place trades on your behalf. This limited power of attorney does not allow us to withdraw money from your account, other than advisory fees if you agree to give us that authority.

You grant us discretionary authority by completing the following items:

- Sign a contract with us that provides a limited power of attorney for us to place trades on your behalf. Any limitations to the trading authorization will be added to this agreement.
- Provide us with discretionary authority on the new account forms that are submitted to the broker/dealer acting as custodian for your account(s).

We also offer non-discretionary advisory services. If you elect to engage us to manage assets on a nondiscretionary basis, we will contact you before each trade is placed in your account.

Most clients do not place limits on Creekside's discretionary investment authority. In certain instances, clients may restrict Creekside's discretionary authority on a temporary basis while the client considers changing circumstances, investment goals or risk tolerance.

Creekside does provide services to certain clients' 401(k) participants on a non-discretionary basis. In

these cases, Creekside provides information regarding investment alternatives available to the participants, as well as capital market education and updates. In these 401(k) plans, investment decisions are determined exclusively by each participant for their own accounts and Creekside executes transactions as directed by the participant.

ITEM 17: VOTING CLIENT SECURITIES

We do not accept the authority to vote proxies on your behalf and we do not provide guidance about how to vote proxies. You will receive proxies and other related paperwork directly from your custodian.

ITEM 18: FINANCIAL INFORMATION

As a registered investment advisor, we are required to provide you with certain financial information or disclosures about our financial condition. None of the conditions below, which would require additional disclosure, apply to Creekside.

- If we required or solicited prepayment of more than \$500 in fees per client, six months or more in advance.
- If we had discretionary authority or custody of client funds or securities, or we required or solicited prepayment of more than \$1,200 in fees per client, six months or more in advance.
- If we had been the subject of a bankruptcy petition at any time during the past ten years.

Brochure Supplement (Form ADV Part 2B)

March 31, 2011

Supervised Persons:

Richard (Rick) Ashburn Jr.

Andrew (Andy) Hempeck

Principals, Creekside Partners

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This brochure supplement provides information about Rick Ashburn and Andy Hempeck that supplements the Creekside Partners brochure. You should have received a copy of that brochure. Please contact us at the above phone number if you did not receive Creekside Partners's brochure or if you have any questions about the contents of this supplement.

Additional information about Rick Ashburn and Andy Hempeck is available on the SEC's website at www.adviserinfo.sec.gov.

Richard (Rick) Ashburn Jr.

Rick serves as Creekside's Chief Investment Officer (CIO) and provides broad oversight and the leadership to achieve the firm's mission and vision. As a senior-level advisor, Rick works with business owners, executives and professionals developing financial plans and investment strategies.

Born: 1960

Educational Background:

- University of Maryland; BA with High Honors in Economics; 1984
- Chartered Financial Analyst (CFA) awarded in 1998. The CFA is awarded up completion of a course of study and a series of comprehensive exams taken over a period of at least three years. The CFA designation is considered the global standard for institutional investment analysts.

Business Experience:

- Creekside Partners Founder and CIO; 2003 to Present
- Prior to 2003, 18 years in the investment industry as a financial advisor, underwriter and disclosure expert.

Rick served as Chief Investment Officer of a private investment firm in San Diego, and as a Managing Director at MBIA, Inc., an S&P 500 company specializing in financial guarantees and investment management. He founded Creekside in 2003.

Other Business Activities: None

Additional Compensation: None

Supervision: Andrew Hempeck oversees compliance-related activities and reviews Rick's advisory work through frequent office interactions.

Arbitration Claims: None

Self-Regulatory Organization or Administrative Proceeding: None

Bankruptcy Petition: None

Andrew (Andy) Hempeck

Andy serves as Creekside's Director of Portfolio Management and handles the firm's portfolio on a day to day basis. As a senior-level advisor, Andy works with business owners, executives and professionals developing financial plans and investment strategies.

Born: 1968

Educational Background:

- Oregon State University, BS in Business Administration, 1990
- UCLA, Certificate in Personal Financial Planning, 2011

Business Experience:

- Creekside Partners Shareholder and Wealth Manager, 2007 to Present
- Fisher Investments, Vice President, 1999-2007

Other Business Activities: None

Additional Compensation: None

Supervision: Rick Ashburn oversees compliance-related activities and reviews Andy's advisory work through frequent office interactions.

Arbitration Claims: None

Self-Regulatory Organization or Administrative Proceeding: None

Bankruptcy Petition: None