Disability Advisory Service (DAS)

Treating clients like our own siblings

June 2019

Sharing Knowledge to Better Serve our Community

Greetings from the Coldstream DAS Team

Dear Friend,

Coldstream's DAS continues its mission to assist those with life changing traumatic injuries thrive once again.

We are very excited to announce that as a **complement to our "Sudden Wealth Syndrome" Roundtable series** we've interviewed injury survivors and professional experts in our community to create a Recovery Checklist. The purpose of the resource is to assist those with traumatic injuries to better **navigate** their journey across **Recovery, Legal, and Wealth Planning challenges**.

We are **providing it to the WSAJ, OTA & disability community networks for free for the purpose of helping those in our community** facing these challenges. Please feel free to pass this along to anyone you feel may find this a helpful guide. **For future reference we will host it on our resource section of our website**. Should you wish to further customize content for your needs or co-brand the materials, please contact us; we will be happy to collaborate with you to do so."

As always, we are here to assist. Should you have a potential client that needs wealth management services and a strong advocate we stand ready to serve.

Thank you from the DAS Team,

Roger Reynolds   Brian Plowman

Evan Monez   Vonie Bright   Brian Holt

Julie Murray   David Powers

Helping Clients Do Life: Passion Drives Us All

YOUR DAS TEAM

PROUD PARTNERS OF...

OTLA

WASHINGTON STATE ASSOCIATION for JUSTICE

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HOW COLDSTREAM IS DIFFERENT

Here you'll find a **diverse team of passionate professionals** who will advocate for your client; taking into account their unique lifestyle, challenges, abilities, and goals. Above all else, we don't give a cookie-cutter solution to wealth management**.** **We take the time to listen and plan a personalized strategy**; working tirelessly towards achieving your client's **financial peace of mind and quality of life goals.**

We are a comprehensive wealth management firm, **skilled in tailoring** our guidance to meet **your client's specific needs.** Our goal is to be a team of professionals they can depend on.

As every client is unique, **our services go beyond managing an investment portfolio;** we customize our approach for each client. **Like great legal representation, Coldstream's value is in the details, execution, and our advocacy.** We invite your clients to experience the quality guidance they deserve.

As always, we stand ready to discuss how we can serve and assist in any way.

CLIENT BENEFITS OF THE COLDSTREAM EXPERIENCE

Dedicated financial advocacy, tailored strategies, risk mitigation, tax planning, alternative investment vehicles, and life planning.

CHARITABLE IMPACT AS A THANK YOU TO YOU

For every new client received by your referral Coldstream will donate to a charity of your choice in 2019 through our Referral Recognition Program.

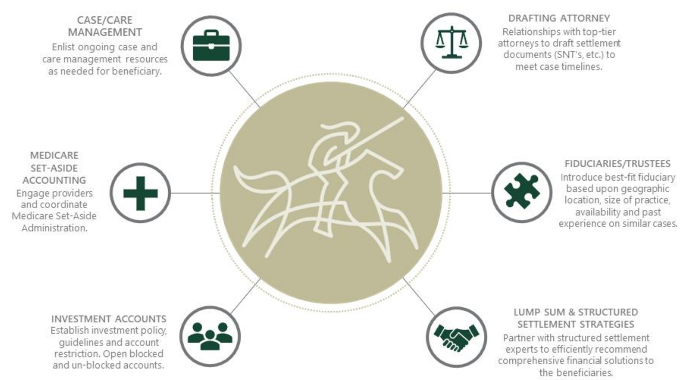
NEW CASE FINALIZATION PROCESS

Developed to streamline the process of transitioning our clients into their financial steady-state. Delivers quick and efficient workflows for our partner attorneys across…

- Fiduciaries/Trustees
- Trust Drafting Attorney
- Structured Settlement Analysis
- Investment Accounts
- Medicare Set-Aside Accounting
- Case/Care Management needs

COLDSTREAM'S CASE FINALIZATION

Assisting Law Firms and their clients to close cases quickly and efficiently.



TEAM MEMBER

I've been at Coldstream for just north of four years but have over 20-years of experience. One of the main lessons that I have learned over the years is to take the emotion out of the day-to-day aspects of investing; it is counter productive. However, when I take a step back and realize my efforts are instrumental in helping families, especially those that have gone through a traumatic experience, achieve their financial goals, I feel a sense of tremendous pride and humility to serve.

David Powers, CFA®
Portfolio Manager

Education:
B.A. Finance
Bryant University

Hobbies:
Golf, Yoga, Crossword Puzzles

The CFA Institute owns the certification marks CFA® and Chartered Financial Analyst®.

PROUD PARTNERS OF…

NSCIA The National Spinal Cord Injury Association
outdoorsforall FOUNDATION
Brain Injury Alliance WASHINGTON
Brain Injury Alliance of Oregon
CRAIG
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Paralyzed Veterans of America
PUSHING BOUNDARIES Exercise, health and hope for people with paralysis