



Disability Advisory Service (DAS)

Treating clients like our own siblings

December 2018

REFLECTING ON OUR MISSION

Happy Holidays from the Coldstream DAS Team.

Dear Friend,

During this time of year, we often reflect on those who have traveled a path more difficult than our own. It is for this very reason, that in 2011 we created the DAS Initiative at Coldstream Wealth Management. We believe in taking a sibling approach when caring for our clients to help them thrive.

As awareness of our mission increases, we have seen our community grow with new attorney relationships and opportunities to serve a broad clientele. We are eager to discuss how we can have a positive impact on your client's life.

2018 was an incredible year. We launched our new Case Finalization Process to help streamline workflow - getting clients from pre-settlement to the next chapter of their lives more efficiently. Additionally, we've added yet another incredibly strong team member, offering unique value & experience to our DAS clients. We look forward to partnering with you and continuing our financial advocacy in 2019.

Happy Holidays from the DAS Team,

Roger Reynolds

Brian Plowman

Evan Money

Vonie Bright

Brian Holt

Julie Murray

David Powers



Join with the Coldstream Family.

YOUR DAS TEAM



PROUD PARTNERS OF...



COLDSTREAM
WEALTH MANAGEMENT

One 100th Avenue NE, Suite 102
Bellevue, WA 98004
425-2831600
TeamRR@Coldstream.com





Disability Advisory Service (DAS)

Treating clients like our own siblings

December 2018

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; therefore, 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.



NEW TEAM MEMBER

I've long had a passion for helping those with traumatic life events overcome and thrive again. I was paralyzed in my youth in a car accident so I know first hand the experience of being thrust into a new world - physically, mentally and financially.

After a successful 17 year career at Microsoft I have now been blessed with the opportunity to make my passion my second career. I'm thrilled to have joined a team that represents my values and priorities. I'm excited and humbled by the impact my work can make for our clients.

Brian Holt
DAS Strategist

Hobbies:
Mono skiing, snorkeling,
and photography



PROUD PARTNERS OF...



HERE AND NOW PROJECT

