



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 events thrive in their lives once again.

We've been busy - helping clients navigate their investment advisory and injury related needs. As part of our goal to showcase the knowledge Coldstream has at its disposal to serve clients and trustees we've created [4 new case studies](#) that we'd like to share with you. Our services go beyond financial management to include partnerships across accessibility communities helping enable better life experiences for our clients. Knowledge is power!

Additionally, as part of our outreach to the legal community we've hosted Roundtable discussions focused on two topics: [Navigating Sudden Wealth Syndrome and Lump Sum & Annuity Structure Working Together](#).

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 Money

Vonie Bright

Brian Holt

Julie Murray

David Powers



Highlighting Technology to Improve the Life of our Clients

YOUR DAS TEAM



PROUD PARTNERS OF...





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.

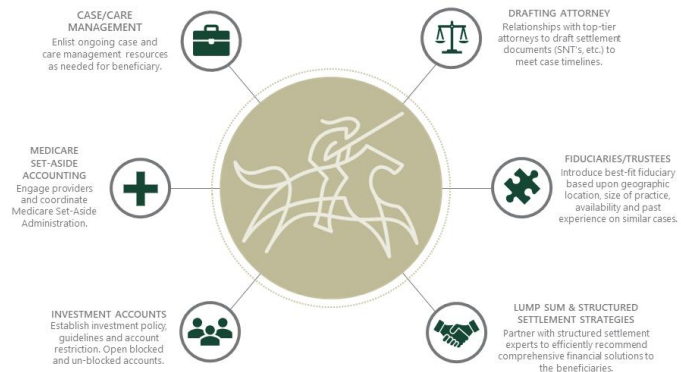
NEW CASE FINALIZATION PROCESS

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

Prior to joining Coldstream, I was a practicing attorney at a prominent law firm in Seattle. My practice focused on estate and tax planning. While I have always enjoyed using my skills to assist clients with their complex planning needs, I also have a passion for giving back to the community. I feel so fortunate to have the opportunity to participate in the DAS initiative as a Wealth Planner, which allows me to merge these interests and help clients who have experienced a traumatic injury navigate any complex trust, estate planning, and tax issues they may need assistance with.

Evan Monez, JD, LL.M
Wealth Planner

Education:
B.A. English Literature,
University of Virginia

J.D. (Juris Doctorate)
University of Texas

LL.M in Taxation
University of Washington



PROUD PARTNERS OF...



HERE AND NOW PROJECT

