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**FOR IMMEDIATE RELEASE**

## **Coldstream Grows with Addition of Rainier Group**

**SEATTLE, WA – February 2, 2017** – Coldstream Holdings Inc. (CHI), the parent company of Coldstream Wealth Management, a registered investment adviser, announced today that it has entered into a merger agreement with The Rainier Group, Inc., a Bellevue firm that offers investment advisory and mid-market business consulting services. Upon merging, Rainier Group Investment Advisory, LLC will do business as Coldstream Wealth Management, and Rainier Group Business Advisory will maintain the name and brand of The Rainier Group, Inc.

Rainier Group Investment Advisory, which oversees approx. \$760 million in assets for over 325 client relationships, was founded in 1988 and embodies many of the same core values that have contributed to Coldstream's success. Both firms provide affluent clients with investment management, financial planning, and comprehensive wealth management services. Coldstream, which currently manages \$1.9 billion in assets, continues to grow both organically and inorganically through mergers with other local, like-minded firms, and offers office locations in Seattle and Bellevue.

Continuing to expand upon the “small firm values and big firm reach” that its tagline espouses, Coldstream is excited to welcome the skilled and dedicated professionals of Rainier Group. “We’ve known the individuals at Rainier Group for years, and have tremendous respect and admiration for the firm they have built. Their team brings unique intellectual capital, resources, and new energy to Coldstream,” said Kevin Fitzwilson, Managing Shareholder, Coldstream Holdings, Inc. “Integrating our companies means bringing an enhanced experience for our clients and even more possibilities for our key personnel.”

Also based in Bellevue, Rainier Group sees this move as a natural progression and a smart step forward for its clients and staff. “We’re thrilled to be merging with Coldstream, a firm we’ve known and admired for a number of years,” said Mark Pellegrino, Managing Director of Rainier Group Investment Advisory. “Our clients will receive great benefit from our shared investment philosophy, client-first service culture and core values, along with the robust resources we’ll devote to shepherding their wealth.” Once the companies are integrated, Mark Pellegrino will lead and manage Coldstream Wealth Management’s sixth client advisory team.

Rainier Group’s mid-market consulting business, Rainier Group Business Advisory, will also integrate with Coldstream’s family of services, providing complementary solutions for clients who are business owners. David Roberts, the President of Rainier Group and head of their business consulting arm, sees clear opportunity in this union: “I really believe this merger will be beneficial for our clients and employees. We have great respect for Coldstream and are looking forward to effectively and efficiently working together to bring integrated services to our clients.” David Roberts will be joining the CHI Board of Directors as Rainier Group’s consulting services enter the ranks of Coldstream’s other affiliates, Fit Insurance, Ascent Capital, and Genesee Investments. Bob Gruber, CEO of Rainier Group, and Skip Bell – both founders – expressed their excitement concerning the next phase of their company’s journey and emphasized their enthusiasm to be an ongoing part of the new structure.

### **ABOUT COLDSTREAM WEALTH MANAGEMENT**

Founded in 1996 in Bellevue, WA, Coldstream was started with a higher purpose in mind – enhancing people’s lives. As the firm grew, our vision began to take shape – to become the definition of excellence in our industry and with our clients. To achieve this, we defined a clear mission: providing peace of mind and strengthening relationships with insight, passion, and action – every client, every day. Clients choose us and stay with us because of who we are and how we work; we have small firm values with big firm reach. We are passionate about and dedicated to every relationship, and we drive results by working with you directly on what matters most. We build relationships with the generations of a family’s wellbeing in mind.



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At Coldstream, we don't just listen – we hear you. Learn more about our sophisticated mix of financial services that include comprehensive financial planning, customized portfolio management, and personalized client services by visiting us at [www.coldstream.com](http://www.coldstream.com).

#### **ABOUT THE RAINIER GROUP, INC.**

Since 1988 The Rainier Group, Inc. has advised over 1000 affluent individuals, charitable organizations, businesses and business owners nationwide in the areas of wealth management and business transition. We help clients clarify complex issues, identify creative solutions, and implement strategies which we believe can put them on a path to achieve their business, family, and personal financial objectives. Headquartered in Bellevue, Washington, our senior advisors average more than 25 years in the investment business, and our analyst and portfolio management teams average over 10 years of experience. To learn more, visit us on the web at [www.rainiergroup.com](http://www.rainiergroup.com).

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