



COLDSTREAM - BOARD OF DIRECTORS

Kevin Fitzwilson

A relatable and passionate leader, Kevin has spent his entire professional career in wealth management serving in a variety of client relationship, administrative support, and leadership roles. Joining Coldstream only a year after it opened its doors, Kevin soon began assisting with business management and providing oversight on the financial, legal, and accounting activities for the firm. Prior to starting with Coldstream, he served as Vice President and Portfolio Manager with a San Francisco Area-based wealth management firm. Now as Coldstream's Managing Shareholder, Kevin has primary responsibility for Coldstream's strategic planning and company direction. Kevin holds a Bachelor's of Science in Civil Engineering from Santa Clara University, where he attended on a full athletic basketball scholarship.

Kevin lives on Mercer Island with his wife and family. He loves spending time on Lake Washington and up in the local mountains. Kevin celebrated his 15 minutes of fame during the 1993 NCAA Basketball Tournament, where he and his team led Santa Clara to beat the #2 seeded Arizona in the first round, and still gets recognized to this day for this accomplishment.

Roger Reynolds

A co-founder of Coldstream, Roger specializes in providing comprehensive wealth management services and diversified investment management strategies to affluent individuals and families. Roger also directs the activities of the Disabled Advisory Services (DAS) group, which focuses on customized financial planning and adaptive-oriented solutions for those with a disability. Prior to helping co-found Coldstream, Roger was a Principal and Portfolio Manager with Seafirst Investment Counselors in Seattle, WA. After serving in the U.S. Navy in both an active and reserve status, Roger earned his Bachelor of Science degree in Finance, with an emphasis in Investments, from California State University, Long Beach.

Since the beginning of his career, Roger has been involved with the Outdoors For All Foundation, a year-round adaptive recreation program for people with disabilities in Washington. He is also a founding member of Northwest Next – an alumni organization for the Puget Sound Business Journal's "40 under 40" honorees – and currently a member of the Seattle YPO/WPO chapter. Roger lives on the Eastside with his family and spends his days gardening, riding his Harley, and being an active member of the community.

Michael Butler

Chairman & CEO of Cascadia Capital, Michael Butler leads the firm and the firm's Energy Environment and Sustainable Technologies practice. In addition, he is focused on the strategic direction and growth of the firm. Butler has been involved in over 100 transactions while at Cascadia Capital.

Prior to co-founding Cascadia Capital, Butler served as a Managing Director at Lehman Brothers responsible for global equity sales and equity syndicate. He also served on the firm's Equity Commitment Committee, Equity Syndicate Committee and Private Equity Commitment Committee. Before joining Lehman Brothers, Butler was a Principal with Morgan Stanley & Company, where he was responsible for divisional global product and risk management and was a member of the division's Operating Committee. He has been involved in numerous equity financing transactions for both public and private companies.

Butler holds a B.A. in Political Science from the University of Washington and an M.B.A. in International Finance from the Wharton School of the University of Pennsylvania.

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Rich Simmonds

Rich Simmonds is currently co-director of the Pacific Family Business Institute. Rich has worked with family businesses and their advisors for nearly 30 years. As a Seattle-based family business consultant, he assists university family business centers with development, coordination and hosting of workshops for family businesses.

Rich is involved with the family business initiatives at Oregon State University, Seattle University and Gonzaga University. He is a board member of the Family Enterprise Research Council, an international non-profit that conducts and promotes family business research, and a number of Northwest family businesses. In 1995, Rich co-founded Tyee Asset Strategies, a \$4 billion wealth management company. Rich served as its Chairman until Tyee was acquired by the 7th generation Laird Norton Company in 2004. He has degrees in marketing and finance from Central Washington University.

John Orehek

Recently retired from his position as Chief Executive Officer of Security Properties, Orehek brings Coldstream's Board over 30 years of real estate investment and business management experience. Orehek over saw Security Properties growth and recognition as a national owner, developer and operator of residential real estate. Over his career, he has helped structure hundreds of agreements between real estate sponsors and investors and remains active as both a real estate consultant and investor.

Gary Rubens

A private investor and entrepreneur based in Bellevue, Rubens brings to Coldstream 25 years of experience in launching startups, business acquisition, commercial real estate investing, and running large scale businesses. His previous roles include President and CEO of Architectural Details, Lighting Universe and ATGStores.com as well as VP of Lowes Corporation. An avid philanthropist, he also founded the Rubens Family Foundation which focuses on providing underprivileged kids with college scholarships and supporting no-cost adoptions for foster kids. Most recently, Rubens announced a five-year, \$20 million donation from his foundation to the Washington State Opportunity Scholarship (WSOS) and has donated over \$26 Million to date to fund educational programs since selling his business to Lowes in 2012.

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