



MISSION STATEMENT

Coldstream uniquely blends comprehensive wealth management services with a disability advocacy platform. We aspire to shorten the timeline for re-establishing quality of life for our clients; unlocking their new life vision and restoring access to their passions and purpose.

We do the heavy lifting, simplifying the complexities of wealth and disability related challenges. Financial stability is just the beginning of the story for those we serve – ad Meliora (towards better things)



WEALTH MANAGEMENT

A team of experienced individuals creating investment plans with the following in mind.

- Dedicated Financial Fiduciary
- Tailored Strategies
- Risk Mitigation Framework
- Unique Alternative Investments
- Tax and Estate Planning

DAS ADVOCACY ACTIONS

Knowledge is power; DAS Project Managers have the experience and connections to solve complex disability related challenges with efficiency and elegance.

Examples of advocacy case studies...

- ADA life modifications
- Specialized equipment solutions
- Care coordination & life coaching
- Travel and recreational enablement
- Medical insurance appeals for coverage
- Emergency resource support

CASE FINALIZATION PROCESS >>>>

Our deep knowledge in these categories and connections with best-in-class partners provides meaningful benefit to attorneys and clients.

Every client situation is different. A dedicated DAS Project Manager works with the client and their attorney to aid in closing the case quickly and skillfully.



WHAT OUR PARTNERS SAY ABOUT US

“ *The need for comprehensive wealth management within the disabled community has never been greater. With a culture of focusing its resources and wisdom on ensuring settlement recipients regain normalcy in their lives, Coldstream has transformed the experience these individuals and their families receive. Coldstream continues to provide outstanding services to our clients who have received a substantial financial settlement. This gives me confidence their needs are being met today, and into the future.* ”

- JACK CONNELLY, CONNELLY LAW OFFICES

“ *Managing finances for injured people is unique. We know of no other financial manager in the Pacific Northwest with more experience managing money for injured people than Coldstream. Roger and his team care about our clients and spend considerable time and energy to make sure that their assets are well preserved to take care of their needs. When my clients hire Coldstream, I sleep better.* ”

- MIKE WAMPOLD & ANN ROSATO, PETERSON, WAMPOLD, ROSATO, FELDMAN, LUNA

“ *The Spinal Cord Injury Association of Washington has grown a strong friendship with Coldstream over the years. Staff from Coldstream regularly volunteer at our events, donate, and help raise awareness for those with disabilities. We have seen firsthand Coldstream's passion and effort in SCIAW activities, and they are well recognized for their support of numerous organizations within the disabled community, such as Outdoors For All, Pushing Boundaries, Christopher Reeve's Foundation and The Here and Now Project. They are clearly committed to these causes and to enhancing the lives of individuals with a disability.* ”

- KAREN KOEHLER, STRITMATTER

“ *Coldstream recognizes the long-term planning issues that are critical to an individual with a disability, and they have assembled a particular set of services to address this need. Over time there are numerous pitfalls that can challenge individuals and their families after receiving a financial settlement, yet Coldstream's strong advocacy promotes the preservation of their financial resources for those future purposes.* ”

- TONY CHOPPA, M.ED., CRC, CCM, CDMS, OSC VOCATIONAL SYSTEMS, INC

COMMUNITY PARTNERSHIPS FOR OUR CLIENT'S BENEFIT



HERE AND NOW PROJECT

