

# YOUR DEDICATED TEAM



**ROGER REYNOLDS**  
Team Lead &  
Relationship Manager

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Roger began his investment career in banking in 1989. He co-founded Coldstream in 1996 and since then has continued to focus on the wealth management objectives of individuals, families, and those living with disabilities or special needs.

- B.S., Finance – Cal State University, Long Beach
- Formerly served in the U.S. Navy



**DAVID POWERS, CFA®**  
Portfolio Manager

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David joined Coldstream in 2014 after relocating from Boston. Starting in finance in 1996, David brings 20+ years of investment research, portfolio management, and strategic investment experience to Coldstream.

- B.S., Finance – Bryant University
- Member of Investment Strategy Group (ISG)
- Chartered Financial Analyst® Charter holder



**BRIAN HOLT**  
Disability Advisory Services  
Strategist

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Brian joined Coldstream in 2018 after 15+ years with Microsoft. Brian guides the DAS team through business strategy and planning.

- B.A., Finance & Marketing – University of Washington, Magna Cum Laude Honors Graduate
- Microsoft Executive Education – Kellogg School of Management



**MARCI MUHLESTEIN, MBA**  
Disability Advisory Services  
Partnership Manager

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Marci joined Coldstream with 20+ years of disability advocacy combined with strong marketing, business development, and program management skills. Her focus is on expanding the DAS partnership network and providing disability advisory services.

- B. S., Occupational Therapy – University of Puget Sound
- M.B.A. – Western Governors University



**IAN CURTISS, CFA®, CFP®**  
Associate Relationship Manager  
& Wealth Planner

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Ian joined Coldstream after spending 6+ years within the financial industry. His diverse work experience has exposed him to much of the wealth management industry and allowed him to work closely with clients. Ian is part of the new cohort of Associate Relationship Managers and looks forward to continuing his career servicing clients in this capacity.

- B.A., Financial Economics – Seattle Pacific University



**GEORGIAN MALOY**  
Private Client Services  
Associate

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Georgian joined Coldstream after spending 6+ years as a Senior Client Associate at Laird Norton. Her wealth of industry experience and educational background make her an amazing addition to the team. Georgian is currently a CFP Candidate and looks forward to continuing her work with clients.

- B.A., Finance – University of Washington



**DANIELS VOYTESHONOCK**  
Private Client Services  
Administrator II

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Daniels has spent his post undergraduate career in the financial industry. He brings 15+ years of relevant experience to Coldstream and is excited to build relationships with clients as he assists in helping them achieve their financial goals. Daniels is currently a CFP Candidate and has a desire to continue learning and growing in this industry.

- B.A., Finance & Economics – University of Oregon



**JASON THONSSSEN**  
Private Client Services  
Administrator II

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Jason joined Coldstream after 5 years in the wealth management field in Bellevue, working in client service and operations capacities. Prior to that he began his career in the nonprofit sector, initially working on sustainable construction projects and then as a job coach for adults with disabilities. He hopes to bring the same level of dedication to clients and attention to detail to the administrator role at Coldstream.

- B.A., Sociology – Gonzaga University

Contact us at [teamreynolds@coldstream.com](mailto:teamreynolds@coldstream.com)