

DISABILITY ADVISORY SERVICES



BETTER OUTCOMES

Living with a disability can be complex – financially, physically and emotionally.

Coldstream Disability Advisory Services (DAS) combines experienced Wealth Management and disability advocacy services in pursuit of better outcomes for clients.

We are the trustworthy handoff attorneys seek.

WEALTH MANAGEMENT

An experienced financial fiduciary team creating investment plans with the following in mind:

- Investment Advisory Strategies
- Personalized Financial Planning
- Broad Diversification
- Risk Management
- Tax and Estate Planning



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

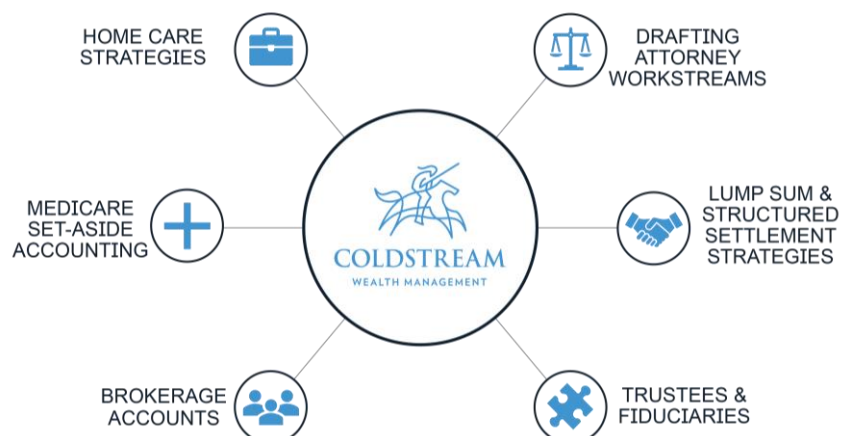
Examples of DAS advocacy in action:

- Accessibility and life modifications
- Specialized equipment solutions
- Home care planning
- Travel and recreational enablement
- Health and wellness resources and strategies
- Community resources and mentoring

CASE FINALIZATION

Deep knowledge & professional networks in each of these categories provides meaningful benefits to attorneys and their clients.

Guided by a dedicated DAS Project Manager, we collaborate towards 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



GETTING TO KNOW THE DAS TEAM AND HOW WE ALL COME TOGETHER



ROGER REYNOLDS

Team Lead & Relationship Manager

“Our DAS team creatively seeks opportunities to serve others where it may not be apparent there is an avenue to do so. I’ve learned that service-over-self is most powerful when combined with others who are like-minded and there exists a mechanism to facilitate action.”

“Having the platform to blend my personal passion of assisting those living with a disability or special needs with my career skills is truly a blessing in my life.”



BRIAN HOLT

Disability Advisory Services Strategist

“After 17 years at Microsoft I had many options for my second career – I chose Coldstream and this team precisely because of its mission to help people overcome traumatic injuries like I overcame over two decades ago when paralyzed in a car accident.”

“The impact of those who came before me, helping me in my journey, made all the difference in my life. I humbly hope to do the same for the next generation.”



MARCI MUHLESTEIN

Disability Advisory Services Partnership Manager

“For 25 years, I have worked with individuals with disabilities and their families, and the one thing I have learned is that every situation has its unique challenges. Yet, working through these challenges creating innovative solutions is a passion.”

“Building strong partnerships within our collective communities will increase choices and grow the extraordinary opportunities to continue toward an inclusive, fulfilling life.”



IAN CURTISS

Associate Relationship Manager and Wealth Planner

“Being a part of the DAS team at Coldstream has given me the opportunity to use my skills and passions in a way that produces a greater impact than I could have ever hoped for. Stewarding assets, helping navigate intricate financial situations, and providing peace of mind to the clients that we serve is a great honor.”

“My goal is to help clients develop and implement a roadmap for their financial future so that they can move forward to whatever is next in their lives with confidence.”



DAVID POWERS

Portfolio Manager

“Some of the best investment decisions you make are the ones you don’t make; avoiding hot trends and controlling emotional responses with resolute strategies can make all the difference in a portfolio.”

“Alternative assets that are non-correlated to traditional stock and bond markets can help provide a more comfortable path (ride) to achieving financial goals.”

REFERRAL RECOGNITION PROGRAM



CHARITABLE IMPACT AS A THANK YOU TO YOU

The continued success of the Coldstream Disability Advisory Services (DAS) initiative is significantly dependent upon receiving introductions from personal injury law firms, fiduciaries/attorneys, structured settlement providers, life care planners, and other disability-related organizations.


Through charitable donations to non-profit organizations, we will recognize our community partners for their support of DAS and for providing Coldstream with a new client relationship opportunity.

When we are engaged by a new client, we will make a directed donation on behalf of a referrer to a qualified non-profit organization of their choice.

Program Guidelines

- Donations will be made after formal client engagement of Coldstream.
- Designated charity must be a registered 501(c)3, or equivalent organization.
- Designated charity must not engage in any political activity¹.
- Donations are one time and not ongoing financial obligations.

¹Due to financial services industry regulations, as a Registered Investment Advisor (RIA), Coldstream reserves the final approval of any organization submitted. In the unlikely event of a disapproved organization, we will work with the referrer to designate a mutually acceptable 501(c)3 entity.



Coldstream DAS delivers guidance to individuals living with a disability by focusing on customized financial planning, personalized attention, and adaptive-oriented solutions. We serve our clients as a life-long compassionate advocate.