

REFERRAL RECOGNITION PROGRAM



CHARITABLE IMPACT AS A THANK YOU TO YOU

The continued success of 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 relationship, 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.