# YOUR DEDICATED TEAM

*Contact us at teamreynolds@coldstream.com*

**ROGER REYNOLDS**
Team Lead &
Relationship Manager

425.283.1602
roger.reynolds@coldstream.com

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

425.283.1631
david.powers@coldstream.com

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® Charterholder

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

425.463.3022
ian.curtiss@coldstream.com

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. As an Associate Relationship Managers, Ian enjoys continuing his career in this industry and servicing clients in this capacity.

- B.A., Financial Economics – Seattle Pacific University
- Chartered Financial Analyst® Charterholder
- Certified Financial Planner® Professional

**BRIAN HOLT**
Disability Advisory Services
Strategist

425.283.1622
brian.holt@coldstream.com

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

425.283.1618
marci.muhlestein@coldstream.com

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

**GEORGIAN MALOY**
Private Client Services
Associate

425.283.1649
georgian.maloy@coldstream.com

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

425.283.1617
daniels.voyteshonock@coldstream.com

Daniels has spent his post undergraduate career in the financial industry. He has 15+ years of relevant experience and enjoys building 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 THONSSEN**
Private Client Services
Administrator

425.283.1612
jason.thonssen@coldstream.com

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 brings a strong level of dedication and attention to detail our client appreciate.

- B.A., Sociology – Gonzaga University

**DIANA RICE**
Private Client Services
Administrator

425.463.3058
diana.rice@coldstream.com

Diana joined Coldstream with 6+ years of work experience from Northwest Plan Services. As a Private Client Services Administrator, Diana works primarily with clients on their daily financial tasks. There are various moving pieces when it comes to comprehensive wealth management. Diana's prior work experience, attention to detail, and wholistic approach aims to ensure our clients are protected across their finances.