

## Item 1- Cover Page – Brochure Supplement

**COLDSTREAM**

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### **Business Development Officers**

This Brochure Supplement provides information about your Coldstream Wealth Management Team that supplements the Coldstream Brochure. You should have received a copy of that Brochure. Please contact Client Services at 425-283-1600 or inquire via [www.coldstream.com](http://www.coldstream.com) if you did not receive Coldstream's Brochure or if you have any questions about the contents of this supplement.

Additional information about the persons under this Wealth Management Team is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Detlef Schrempf, Director of Business Development**

### **Item 2 - Educational Background and Business Experience**

Detlef Schrempf is Director of Business Development. Prior to joining Coldstream, he was a General Partner at Athlon Ventures, a private equity fund he co-founded in 1999. Athlon Ventures invested in venture capital, real estate, and other unique opportunities. Mr. Schrempf was responsible for fund raising, deal flow, strategic partnerships, and marketing.

In 1985 after an All-American career at University of Washington he started his professional basketball career in the NBA, which lasted 16 years. In 1993 Detlef started working with adidas international and initiated their global basketball grassroots program through the adidas All-Star Camps. He has directed these camps in Europe, Asia, South America, and the US and has helped re-structure and build new concepts and projects for the grassroots program throughout the last decade.

He has actively invested in a diversified portfolio of corporations, real estate development, manufacturing, and hotel industry entities. Detlef Schrempf spent the 2006 and 2007 seasons as an assistant coach with the Seattle Sonics in the National Basketball Association. His responsibilities besides coaching included scouting, preparation, and developing a data base for concepts and plays.

Detlef was born in 1963 and studied International Business at the University of Washington.

### **Item 3 - Disciplinary Information**

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

### **Item 4 - Other Business Activities**

Detlef is currently on the advisory board of Cauze, Find Ventures, and various children's charities in the Northwest. He is also on the advisory board and an investor in JumpShot, a tech-enabled basketball business providing upscale basketball entertainment venues for every kind of player. Cauze was founded on the idea that by making giving simple and social, people will give much more to nonprofits than they do now. Detlef joined Cauze's Advisory Board in 2021. Find Ventures envisions a world where all entrepreneurs have a shot at solving our greatest challenges and those who seek resources can find them confidently. Through early-stage funding, they are seeding a generation of founders and innovation for all. Detlef and his wife Mari started the Detlef Schrempf Foundation in 1995 and were deeply involved until its closing in 2019. The foundation produced a variety of fundraising events including golf tournaments, galas, and auctions. Detlef continues to be involved in charitable initiatives in the Pacific Northwest. Detlef also served as a member of the advisory board for Pro Trust Growth Fund and SV Equity Growth Fund I, beginning in 1996; these funds have since closed. Detlef was a board member of the Seafood Nutrition Partnership from its founding until 2020.

### **Item 5 - Additional Compensation**

Registered investment advisers are required to disclose all material facts regarding any other business activities that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

### **Item 6 - Supervision**

Business Development and Marketing activities are supervised by Coldstream's Managing Director of Corporate Development, Josh Harris, who may be reached at 206-466-6203 or [josh.harris@coldstream.com](mailto:josh.harris@coldstream.com).

## **William C. Krueger, Business Development**

### **Item 2 - Educational Background and Business Experience**

Bill Krueger is a Business Development Officer. Prior to joining Coldstream in 2017, he was a Business Development Officer at Rainier Group Investment Advisory, LLC. He started working with Rainier Group Investment Advisory, LLC at a Business Development person in 2015. Mr. Krueger was a Registered Representative at Wells Fargo Advisors, LLC from 2011 to 2014. Before that he was a financial advisor at Morgan Stanley & Co. from 2009 to 2011. He also worked as a financial advisor with Merrill Lynch, Pierce, Fenner & Smith Inc. from 2005 to 2009. From 2003 to 2005 Bill was a VP/Client Advisory Officer with Harris Bank.

In 1980 after an All-Century Team career playing baseball and basketball at the University of Portland he started his professional baseball career in the MLB, which lasted 13 years. In 1996 Bill started working with Fox Sports Network NW as a broadcaster. He continues to work in television with Root Sports Northwest as an analyst on Seattle Mariner Baseball.

Bill was born in 1957 and received his Bachelor of Science degree in Business Administration from the University of Portland in 1980.

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### **Item 4 - Other Business Activities**

Mr. Krueger works as a baseball analyst for Root Sports. Throughout the summer, Bill provides viewers the kind of insight and analysis on the Seattle Mariners and all of major league baseball that have made him one of the most visible and popular on-air personalities on the broadcast team.

Mr. Krueger also works as the Director of Individual Philanthropy for Northwest Center, a non-profit organization focused on supporting kids and adults of all abilities from every step of the way: Early Intervention and Early Learning, Employment and School-to-Work Transition services, and a Social Enterprise business model that creates jobs as it provides valuable services to customers. A spokesman on the powers of inclusion in the workplace, Bill advocates for hiring people with physical limitations or developmental delays - not as a compromise, but as a business advantage.

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## **Alexander J. Schrempf, Business Development**

### **Item 2 - Educational Background and Business Experience**

Alex Schrempf is a Business Development Officer. Prior to joining Coldstream in 2021, Alex served as Director for the Aspen Basketball Club and as the Head Basketball Coach for Aspen High School from 2016 to 2021. Alex has an extensive background with sports having worked for the City of Aspen Recreation Department as an Athletic Coordinator, the Aspen Institute as a Teaching Assistant for their annual Youth Action Forum Leader, the National Basketball Association as an International Basketball Operations Intern, Friends of Hoop Seattle as Head Basketball Coach, and Bellevue High School as Assistant Basketball Coach all between 2011 and 2021. Alex attended the University of California, Los Angeles and the Art Institute of Seattle for his undergraduate studies. Alex has furthered his education in wealth management and brings the same philosophy and commitment to community with wealth management as he did to his athletic engagements.

Alex was born in 1990 and studied at UCLA and the Art Institute of Seattle.

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### **Item 4 - Other Business Activities**

Mr. Schrempf works as a Teacher for the Aspen Institute, an educational and policy studies organization based in Washington, DC. providing a nonpartisan forum for values-based leadership and the exchange of ideas. In addition, he joined the Advisory Board for the Rotary Boys & Girls Club of the Greater Seattle Area in January of 2023. Alex also speaks to student athletes in the Greater Seattle area about discipline and resiliency, drug and alcohol awareness and prevention, and motivation, in an effort to support Rise Above and other non-profit youth programs in our region. He is currently co-producing a podcast with Truth+Media to raise awareness and bridge understanding of LGBTQ+ athletes amidst the hyper-masculine culture of sports, and he still coaches on the side with Friends of Hoop Seattle, and for the Issaquah Chapter of Special Olympics, WA.

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## **Thomas C. Knollmann, Business Development**

### **Item 2 - Educational Background and Business Experience**

Tom Knollmann is a Business Development Officer. Tom's goal is to assist clients with the visualization of their goals. He works to provide resources to coordinate personal wealth management activities in daily banking, investment management, retirement planning, insurance/risk mitigation, tax planning, and estate planning to realize their vision. Prior to joining Coldstream in 2017, he was a First Vice President, Senior Private Banker at BMO Harris N.A. from 2010 to 2017. Before that he was a Senior Vice President of Wealth Management at Key Bank N.A.. from 1992 to 2010.

Mr. Knollmann was born in 1957 and received his Bachelor of Business Administration degree from the College of William & Mary in 1979.

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### **Item 4 - Other Business Activities**

No information is applicable to this Item.

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## **William F. Vipond, Jr., Business Development**

### **Item 2 - Educational Background and Business Experience**

Bill Vipond is a Business Development Officer. Prior to joining Coldstream in 2021, Bill owned and operated Viitae Capital Advisors, LLC. As a Registered Representative of Viitae Capital, he provided investment management services to individuals and their families. He is also the President, Founder, and Shareholder of The Cross-Dock Development Corporation (dba The Vipond Group) from 1998 until 2021. From 2011 through 2013, he was a Registered Representative of Grange Capital, LLC.

Bill was born in 1959 and received his Bachelor of Arts degree in Economics and Political Science from the University of Denver in 1982 and his Juris Doctorate from the University of San Diego School of Law in 1986.

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Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

### **Item 4 - Other Business Activities**

Mr. Vipond is the owner of the Cross-Dock Development Corporation dba The Vipond Group, a company that provides real estate brokerage, development, and consulting services. Bill is a licensed real estate broker in the states of Washington and California. These real estate activities comprise the majority of his time.

Mr. Vipond is a lawyer licensed by the California Bar Association. He does not practice law or provide legal advice.

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