

COLDSTREAM

WEALTH MANAGEMENT

COLDSTREAM WEALTH MANAGEMENT STRENGTHENS EXECUTIVE TEAM WITH ADDITION OF NATALIE STRAUB AS CHIEF REVENUE OFFICER

Former Charles Schwab Director's Role Dedicated to Furthering Firm's Ambitious Growth Initiatives and Scaling its Business

SEATTLE – June 15, 2022 — Coldstream Wealth Management (“Coldstream”) – an employee-owned, independently operated registered investment adviser (RIA) – today announced the appointment of Natalie Straub as Chief Revenue Officer. She will report to Kevin Fitzwilson, Managing Shareholder.

In this newly created role, Ms. Straub will dedicate her efforts to developing and implementing Coldstream’s ambitious strategic growth plans, as well as sharing the positive impact the firm has made in the lives of its clients. Additionally, she will support existing wealth management teams and new merger partners by introducing consistent business planning and coaching programs that reinforce each wealth manager’s goals and also work to scale Coldstream’s business, positioning it for continued success.

Coldstream, one of the leading wealth management firms in the Pacific Northwest, serves high-net-worth and ultra-high-net-worth families, individuals and business owners by providing customized, advice-based wealth management, insurance and financial planning services. The firm manages approximately \$7 billion in assets.

“We are excited to welcome Natalie, whose experience, professional skills and character make her a tremendous addition to our executive leadership team,” said Mr. Fitzwilson. “As our growth accelerates through mergers with like-minded RIA firms, we continue to attract amazing talent to the company. We look forward to working with Natalie to develop and refine business strategies to integrate our newest partners and further scale the firm. Her expertise as a hands-on coach and advocate for advisors will support our teams’ ability to deliver exceptional experiences to clients.”

Ms. Straub’s addition to the Coldstream executive leadership team comes as the firm continues to grow at a rapid pace. In 2021, Coldstream merged with Paracle Advisors and Rosenbaum Financial, firms that collectively managed approximately \$1.9 billion. Earlier this year, it opened an office in Boise, Idaho.

Ms. Straub has over two decades of financial services experience. She most recently served as Director & Senior Business Management Consultant at Schwab Advisor Services. In that role, she encouraged and guided the firm’s RIA clients to overcome leadership and business challenges to clear the way for outsized growth. During her 16-year career at Schwab, she was known for being a positive catalyst for change and for taking a strategic idea and driving it to implementation.

Ms. Straub said, “I have gotten to know Coldstream and many of its wealth managers over the years as clients in my capacity as a Business Management Consultant with Schwab, and I’ve always found the team to be an innovative and forward-looking group of professionals who care deeply about their clients. I’m thrilled to join Coldstream and get the opportunity to play an important role in ensuring the firm’s ongoing success.”

Ms. Straub earned a BA in Business Administration from San Francisco State University and holds her FINRA Series 7 and 63 securities licenses.

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About Coldstream Wealth Management

Coldstream Wealth Management is an employee-owned, independently operated wealth management firm that has been earning the trust of high net-worth clients since 1996. The firm guides clients through the complexity of wealth management so that they can have peace of mind while achieving their financial and lifestyle goals. Coldstream has offices in Bellevue, Seattle, and Mercer Island, Washington, Boise, Idaho and Portland, Oregon. The firm is a wholly owned subsidiary of Coldstream Holdings, Inc. For more information, please visit <https://www.coldstream.com/>.

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