

# Coldstream Hires Former Charles Schwab Director as Chief Revenue Officer

Coldstream Wealth Management, an employee-owned registered investment adviser, has hired Natalie Straub as chief revenue officer. In her newly created role, Straub will develop and implement Coldstream's "strategic growth plans." Additionally, she will support existing wealth management teams and new merger partners by introducing business planning and coaching programs, and scale elements of Coldstream's business operations.

Straub has more than two decades of financial services experience and recently served as director and senior business management consultant at Schwab Advisor Services.

"We are excited to welcome Natalie, whose experience, professional skills and character make her a tremendous addition to our executive leadership team," said Kevin Fitzwilson, managing shareholder. "As our growth accelerates through mergers of 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..."

Straub's addition to the Coldstream executive leadership team comes as the firm continues to grow. In 2021, the company merged with Paracle Advisors and Rosenbaum Financial, which collectively managed approximately \$1.9 billion. Earlier this year, it opened an office in Boise, Idaho.

Straub holds a bachelor's degree in business administration from San Francisco State University, as well as FINRA Series 7 and 63 securities licenses.

Coldstream 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.

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