

BRAND IDENTITY & STYLE GUIDE 2017

Who We Are &
How We Communicate

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COLDSTREAM
WEALTH MANAGEMENT

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Email Signatures	Error! Bookmark not defined.
Examples w/ All Options:	Error! Bookmark not defined.
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THE BASICS: WHO WE ARE

Corporate Identity

Vision

The light on the hill the organization we seek to build.

To be the definition of excellence in our industry and with our clients.

Mission

Our daily marching orders that get us closer to achieving our vision.

We are dedicated to enhancing people's lives by providing peace of mind and by strengthening relationships with insight, passion, and action – every client, every day.

Values

How we behave, what our clients come to expect from us.

- **Client Focus:** We are 100% dedicated to our client's needs and goals with every decision we make and every action we take.
- **Integrity & Trust:** Trust is earned through demonstrating consistent, rigorous integrity. We follow the rules, act with transparency, and always stick to our principles.
- **Collaboration:** Insights and innovation come from the collective; we work as a team – both with our clients and internally – to ensure we find the best solution
- **Innovation:** Our clients' needs and our business needs demand original, creative thinking; we always challenge ourselves to innovate on behalf of our clients
- **Continuous Learning:** We are forever students with a thirst for learning; we will never stop honing our skills to raise our game and the standards in our industry
- **Financial Sustainability:** We manage and grow our business for long-term sustainability; we are in this business to serve our client families for generations to come.

What We Do

Description Statement

The 30-second, two-line explanation of what Coldstream is and does.

An independent employee-owned firm, Coldstream Wealth Management offers comprehensive financial planning and customized investment portfolios. With 5 dedicated client service teams and an innovative Investment Strategy Group, we deliver small firm values with big firm reach - helping you make the complex decisions that come with wealth so you can achieve the life you've always dreamed of living.

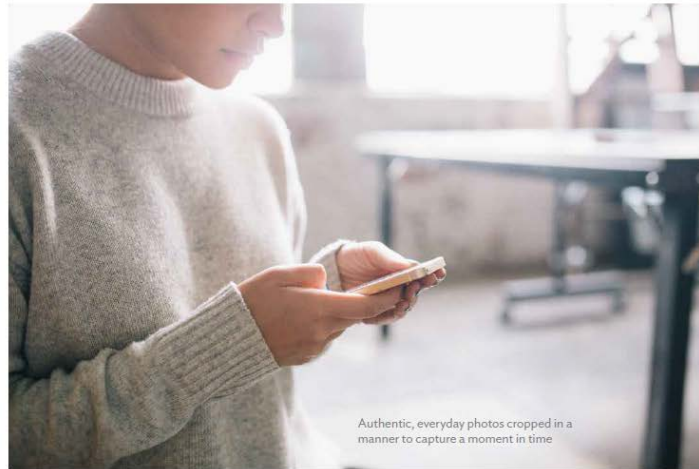
Our Services

Customized services provided to a typical client.

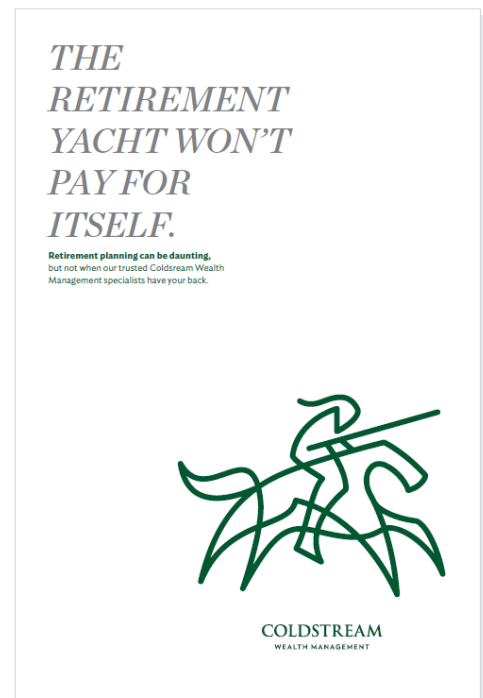
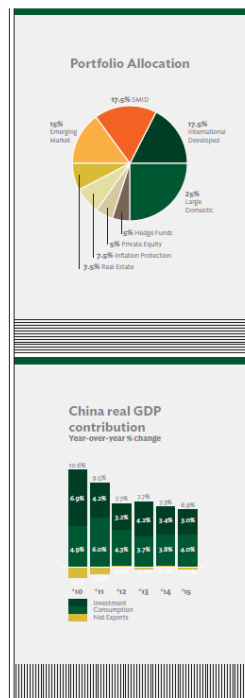
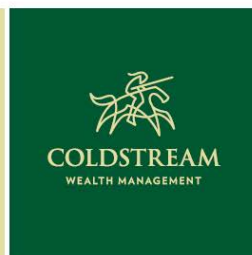
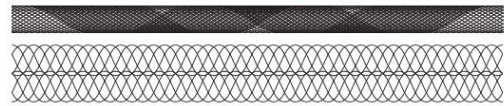
- Investment Advisory
- Financial Planning
- Tax Planning & Estate Design
- Risk Management
- Private Client Services

Style & Art Direction

A classic, Vanity Fair look – as if Nordstrom’s created a Financial Services organization – that conveys strength, confidence, and freedom through real-life moments and clean metaphors.



*LET'S
START
A dialogue.*



THE TOOLS: HOW WE COMMUNICATE

Written & Messaging Guidelines

Positioning

The unique value we offer, and why people choose to work with us.

Small firm values, big firm reach

Voice

Our editorial tone and the manner in which we communicate.

- **Earnest/Sincere:** We mean what we say and we say what we mean
- **Gracious:** We are kind, genuine, and born to serve. Our approach and industry are not for everyone, and one has to be 'Coldstream grade' to be worthy of our clients.
- **Talented:** We are extremely good at what we do
- **Focused/Determined:** We put our clients at the center of all that we do and work tirelessly to enhance their lives
- **Confident:** We have something to share, and nothing to prove

Narrative

An example of how we can use the tools above to create a story or a narrative for deferent audiences.

Coldstream was started with a higher purpose in mind – **enhancing people's lives**.

As the firm grew, our vision began to take shape – to become the definition of excellence in our industry and with our clients. To achieve this, we defined a clear mission: providing peace of mind and strengthening relationships with insight, passion, and action – every client, every day.

Clients choose us and stay with us because of who we are and how we work – **we have small firm values with big firm reach**. We are passionate about and dedicated to every relationship, and we drive results by working with you directly on what matters most. Our founders' values have never changed.

When clients get to know us – experience our culture, behaviors, and values – they tell us that relationships for us are precious. **We could not agree more**. To demonstrate that, we actively search for innovative opportunities and collaborate openly. We build relationships with the generations of a family's wellbeing in mind. At Coldstream, we don't just listen – we **hear** you.

Visual & Style Guidelines

Logo Usage

Available on the Public Drive under [Marketing Materials>Logos>~Coldstream Wealth Management](#). Please note, that in many cases a specific file type or resolution may be required. If this is the case, please contact Marketing with your requirements.



Coldstream Logo

The Coldstream logo is a one-color logo that is made up of Pantone 7733 (green). It is NOT to be turned on its side, stretched or adjusted in any shape or manner.

Alternate lockup



Do NOT



Alternate color treatments

There will be many instances when the primary logo will not live well on a certain backgrounds. The logos at left serve as alternatives.



Clear space

It is ideal to keep a clear graphic space surrounding the logo. This space is determined by the height of from the baseline of Wealth Management to the top of Coldstream (aka. "the x space"). There should be no other graphic elements that interrupt this space.

Typography (for OFFICE)

Fonts that will display the same on every computer no matter the settings, i.e. universal fonts.

Bookman Old Style & Arial –

- **Bookman Old Style, *Italic*, ALL CAPS, Size 18** is to be used for headlines and headings.
- **Arial, Bold, Size 12** is to be used for subheads (A)
- **Bookman Old Style, *Italics*, Size 12** can be used for an alternative subhead (B).
- **Arial, Regular, Size 10** is to be used for body copy and the main text on the page.

HEADING TEXT

Sub-Heading Text A

Sub-Heading Text B –

Body text and content of what you are writing.

Example:

WE USE METAPHORS & CATCHING HEADLINES

What do we mean by that?

What are we going to focus on?

Body text that is the meat and the content of what you are writing.

DO NOT:

- Use the default Calibri font on Word and PowerPoint.

~~**THIS IS CALIBRI AND IT'S NOT ON BRAND**~~

- Use sentence case for main headings. Always make sure to add or use ALL CAPS:

~~*This Doesn't Work to Visually Distinguish the Heading*~~

Typography (for DESIGN)

Fonts are available only on the Marketing computer. If you need to use these for any reason, please contact Marketing.

WE USE METAPHORS AND SIMPLE LANGUAGE TO ENGAGE OUR CUSTOMERS.

What do we mean by that?

The financial world is full of acronyms and terms that go over people's heads. This creates an environment where consumers feel dumb and embarrassed to ask questions. This goes against everything Coldstream stands for. Yes, we have years of experience and can talk the talk of anybody else, but our real advantage is our friendliness and ability to connect with our customers. Thus, our headlines are written with customers in mind and reflect how ability to connect.

Chronicle Deck Semibold Italic is the headline face that should be used sparingly

Aa Bb Cc Dd Ee Ff Gg
Hh Ii Jj Kk Ll Mm Nn
Oo Pp Qq Rr Ss Tt Uu
Vv Ww Xx Yy Zz
1 2 3 4 5 6 7 8 9 0

Chronicle Deck is to be used primarily for subheads

Aa Bb Cc Dd Ee Ff Gg
Hh Ii Jj Kk Ll Mm Nn
Oo Pp Qq Rr Ss Tt Uu
Vv Ww Xx Yy Zz
1 2 3 4 5 6 7 8 9 0

Ideal Sans Semibold is a weighty sans-serif font that is to be used for bringing attention to items at the beginning of body copy

Aa Bb Cc Dd Ee Ff Gg
Hh Ii Jj Kk Ll Mm Nn
Oo Pp Qq Rr Ss Tt Uu
Vv Ww Xx Yy Zz
1 2 3 4 5 6 7 8 9 0

Ideal Sans Light is a clean sans-serif font that is reserved for body copy

Aa Bb Cc Dd Ee Ff Gg
Hh Ii Jj Kk Ll Mm Nn
Oo Pp Qq Rr Ss Tt Uu
Vv Ww Xx Yy Zz
1 2 3 4 5 6 7 8 9 0

Do NOT

~~do not set headlines in all lowercase~~

Make it all caps instead. Headlines should be set in all caps. I could go on and on about this, but you don't really need to hear a long-winded preaching; just don't do it please.

~~DON'T SET LARGE BLOCKS OF COPY IN THE CHRONICLE DECK [ALL CAPS] FONT—AS IT IS A BIT HARD TO READ AND IS RESERVED FOR SHORTER STRONGER STATEMENTS~~

This is your reminder.

Don't do it. It's just not nice. It's hard on the eyes and dilutes it's impact when really want to get somebody's attention. It's sort of like crying wolf. Keep your copy short and sweet and impactful.

~~BIG IMPACT HEADLINES~~

Will lose their impact if your subheads are made to big.

Keep your subheads the same size as your body copy, but use a weight or two heavier and/or use color to create distinction.

~~DON'T FALL INTO THIS trap~~

Resist the urge to be "expressive" with your typography. In the day and age of shorthand and typing on mobile devices, many people feel the **NEED** to be **very** expressive with their typing. R-e-s-i-s-t this temptation. It can **quickly** get out of hand and start to look like a ransom note from a schizophrenic author.

Colors, Values, & Patterns

Colors are listed with the following information: Color Description, Pantone Code, R/G/B values. For additional color values, please reach out to Marketing.

- **Color Description – Pantone Code – RGB Values**

Full Color Set:

- Light Grey – Pantone Cool Gray 1 – 217/217/214
- Dark Grey – Pantone Cool Gray 9 – 117/120/123
- Dark Green – Pantone 3435 – 21/71/52
- Bright Green – Pantone 7733 – 0/112/65
- Dark Yellow – Pantone 7752 – 207/176/35
- Light Yellow – Pantone 615 – 214/207/141
- Bright Orange – Pantone 7576 – 220/88/42
- Light Orange – Pantone 143 – 241/180/52
- Purple – Pantone 7662 – 122/65/131
- Blue – Pantone 2170 – 95/155/198
- Dark Beige – Pantone 7531 – 122/104/85
- Light Beige – Pantone 453 – 191/187/152

Bright Color Set:

- Dark Green – Pantone 3435 – 21/71/52
- Bright Green – Pantone 7733 – 0/112/65
- Dark Yellow – Pantone 7752 – 207/176/35
- Bright Orange – Pantone 7576 – 220/88/42
- Purple – Pantone 7662 – 122/65/131
- Blue – Pantone 2170 – 95/155/198

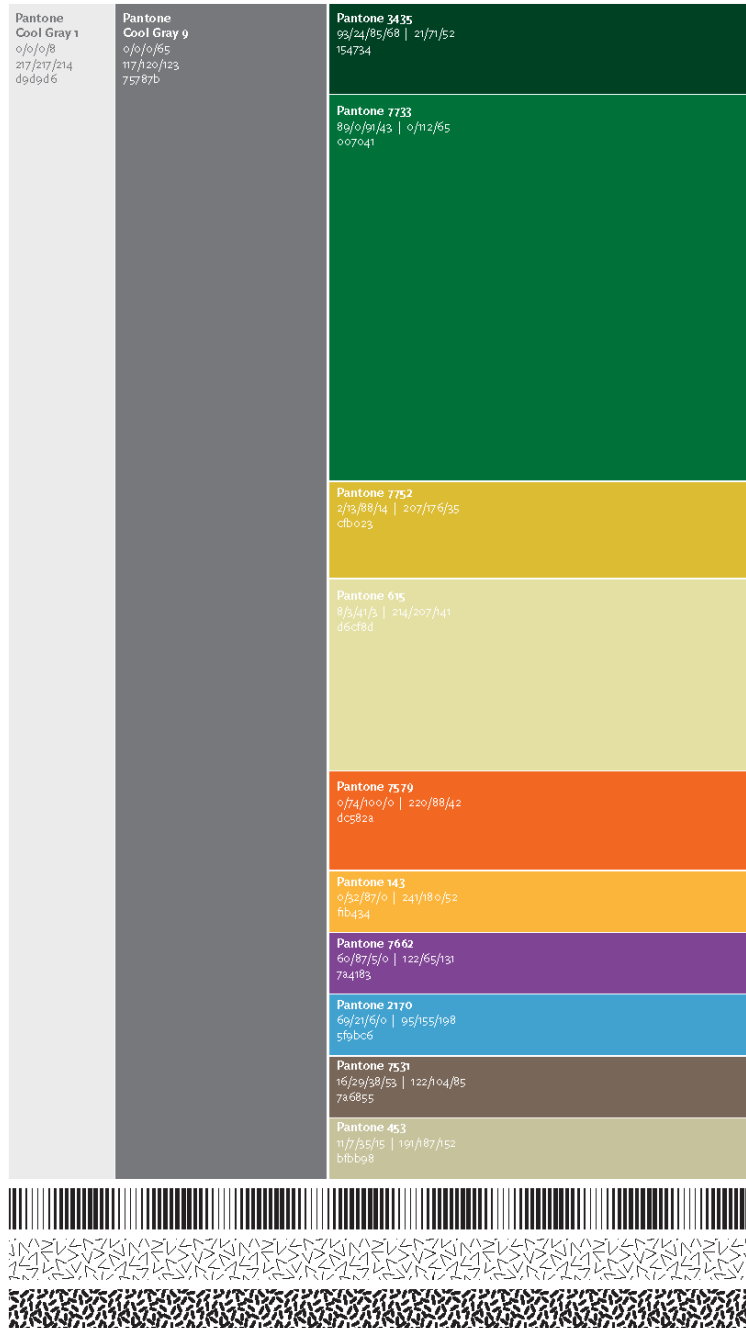
Subtle/Neutral Color Set:

- Light Grey – Pantone Cool Gray 1 – 217/217/214
- Dark Grey – Pantone Cool Gray 9 – 117/120/123
- Dark Green – Pantone 3435 – 21/71/52
- Bright Green – Pantone 7733 – 0/112/65
- Light Yellow – Pantone 615 – 214/207/141

Patterns and Graphic Elements:

- Typical security patterns like hashing, diagonal lines, and others will be used to create a unique visual language for our brand.

Color Details:

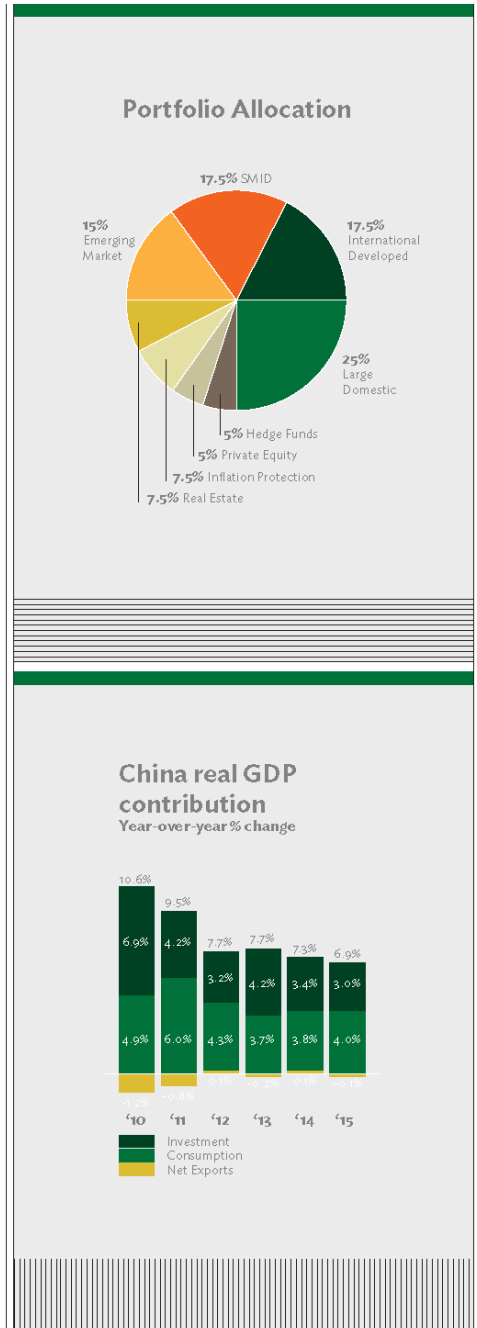


Color

The above color palette and examples demonstrate how color is used; the proportions above reflect which highlight hues are to be used more sparingly.

Security Patterns

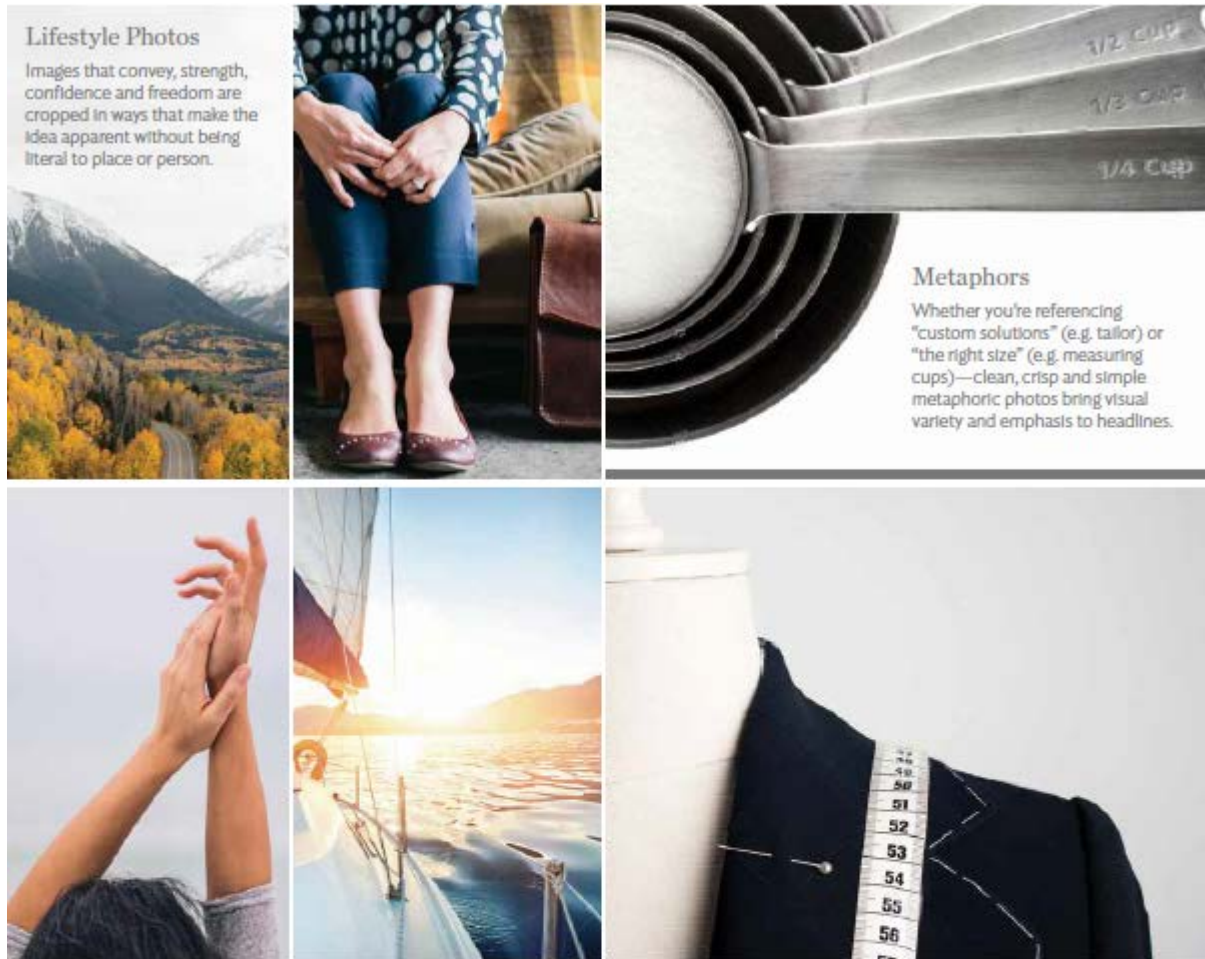
The above graphics are examples of typical security patterns that are to be used to create a unique visual language for the Coldstream brand.



Charts

The above examples show how flat color is used (no drop shadows, highlights, etc) in pie and bar charts.

Pictures & Icons



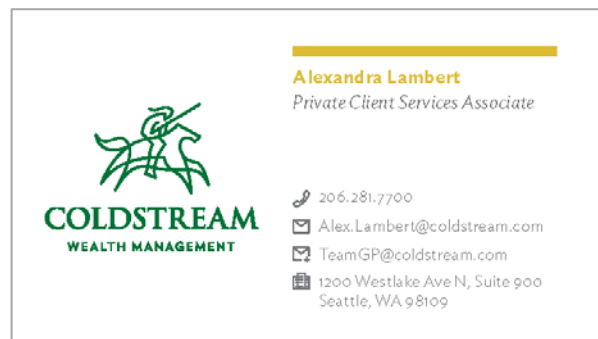
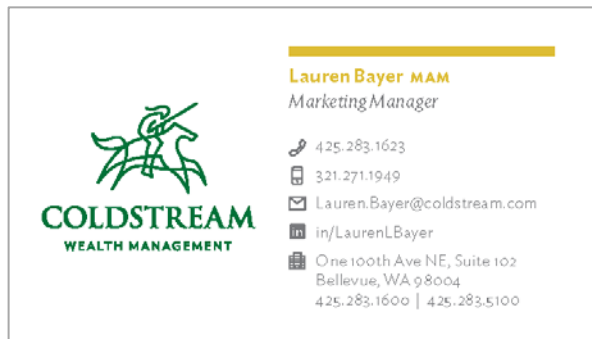
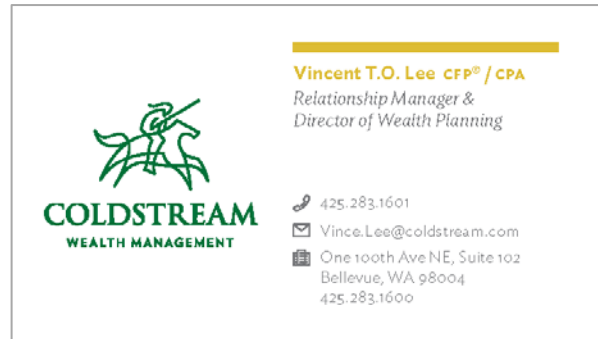
Icons

Icons are to be used in a limited capacity and—whenever possible—in tandem with callouts that give context to the small images.

BRAND & STYLE APPLICATIONS

Printed Tools

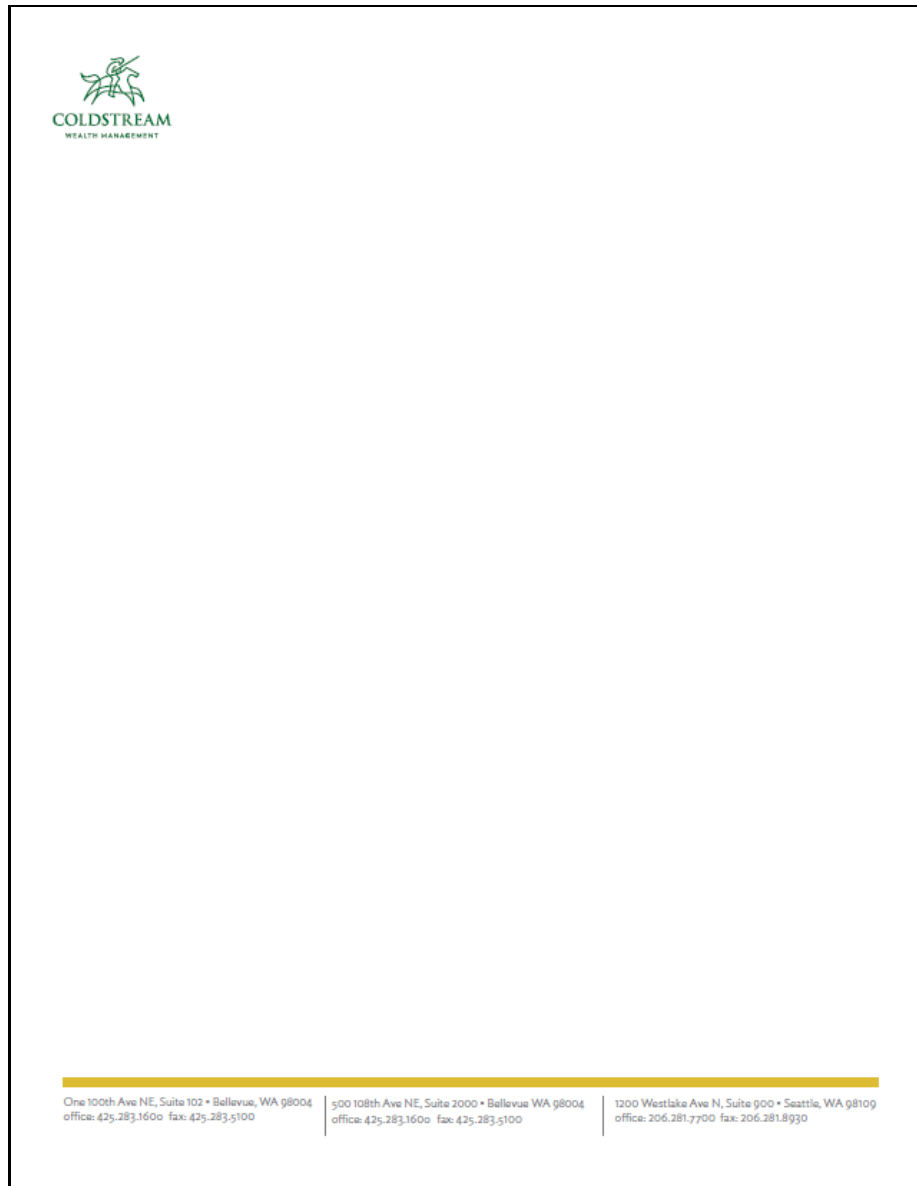
Business Cards



No. 10 Envelopes



Press-Printed Letterhead




Margin Settings – Top: 1.25”, Bottom: 0.5”, Left: 1.75”, Right: 0.5”

Extendable Banner (6")



COLDSTREAM
WEALTH MANAGEMENT

**WEALTH
MANAGEMENT
MEANS**
enhancing people's lives.



coldstream.com

Digital Tools

Email Signatures

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