columbia pacific wealth managment

# media fact sheet

Company Overview

Columbia Pacific Wealth Management (CPWM) is an independent, SEC registered investment advisor that provides comprehensive wealth management strategies for a select number of high net worth individuals, families, foundations and endowments. With some $3 billion in assets, CPWM is one of the fastest growing independent firms in the country.

Headquartered in Seattle, Washington, with a new satellite office in San Francisco, they understand the phases of building, protecting, and distributing wealth presents challenges and opportunities. Because of our affiliate relationships with Columbia Pacific Management founded by Daniel Baty and Columbia Pacific Advisors, we can offer our clients access to unique investment opportunities that give us the ability to design dynamic portfolios that align with our clients’ needs and objectives.

Our tax and wealth planning features the expertise of top tier investment managers, in both public and private markets, that strive to deliver compelling returns with a repeatable, process-driven approach.

Services Offered

Our boutique, shared family office approach allows us to deliver insightful, customized strategies in a collaborative and transparent environment. Working with a select number of clients, our goal is to provide a consistently high level of service which include the following:

* Investment Management
* Tax & Wealth Transfer
* Multi-Generational Planning
* Risk Management
* Philanthropic Planning

Our Executive Team & Founders

Daniel Baty Cofounder

Stan Baty Cofounder

Alex Washburn Cofounder and Managing Partner

Peder Schmidt Cofounder and Managing Partner

Alan Spragins Managing Director Chief Operating Officer & General Counsel

Tyler Gaspard Managing Director and Financial Planning

Taylor Koivu Managing Director and Relationship Manager

Vera Minar Chief Investment Officer

Our Roots & Family Legacy

Our roots stem back more than 25 years when our sister company Columbia Pacific Management (CPM) was founded by Daniel Baty, renowned healthcare entrepreneur. Throughout its existence, CPM has delivered compelling investment results. In 2006, Columbia Pacific Management launched Columbia Pacific Advisors (CPA), an alternative investment platform specifically for the Baty family and a select number of outside investors.

Tapping into this proven experience, CPM and CPA saw a void in high net worth investing and formed Columbia Pacific Wealth Management (CPWM) in 2011. Columbia Pacific assembled a team of highly experienced professionals to create a comprehensive wealth management firm with a boutique feel. Building on its success. In 2017, CPWM expanded into San Francisco acquiring a team of highly experienced professional to manage and launch its first satellite office outside of the Pacific Northwest.

Our Affiliates & Relationships

CPWM enjoys relationships that provide access to unique investment opportunities for its clients.

**Columbia Pacific Advisors, LLC** is an alternative investment firm managing investments across a range of real estate, opportunistic, direct lending and hedged strategies. Its principals and professionals are personally invested alongside its limited partners, and strive to generate compelling risk-adjusted returns on a consistent basis for its investors. Headquartered in Seattle, the company has deep experience in real estate, public and private equity, distressed debt and special situation lending.

**Global Endowment Management (GEM)** spun out of Duke University’s Asset Management Company and the Duke Endowment. It serves as an outsourced CIO for large foundations, endowments, and sovereign wealth funds.

Location

Seattle

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