

YOUR ASSET MANAGEMENT WHOLESALING TEAM

INDEPENDENT ADVISOR DIVISION: CONNECTICUT

Building partnerships for your business

Asset Management Regional Vice President (RVP) RVPs conduct one-on-one and seminar meetings with you to provide product positioning, client acquisition ideas and sales strategies. RVPs are a resource to help you build your business through:

- The latest intellectual capital and thought leadership with insights and analysis from our tenured investment professionals
- Exclusive services through business-building and practice management programs for asset acquisition and retention
- Access to industry-leading, bundled retirement plan services
- Access to world-class investment solutions managed

Asset Management Regional Sales Director (RSD)

Each RSD works with an RVP to provide you specific sales support and product consultation including:

- Product education and positioning
- Access to seasoned portfolio managers and their thought leadership insight
- Competitive research, market development and product-positioning suggestions generated by third-party reports
- Performance comparisons emailed to you



Adam Shanahan

Regional Vice President
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Adam Shanahan is the regional vice president in the independent advisor division for ColumbiaThreadneedle Investments, covering Connecticut. Mr. Shanahan joined the firm in 2010 and has been a member of the investment community since 2006.

Prior to joining the firm, Mr. Shanahan was a financial advisor at Hightower Advisors and Morgan Stanley

Education

- B.S. in economics and finance from the University of Hartford
- FINRA Series 7, 31 and 66 registrations



Frank Coulom III

Regional Sales Director
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Frank Coulom is a regional sales director in the independent advisor division for ColumbiaThreadneedle Investments. Mr. Coulom joined the firm in 2013 and has been a member of the investment community since 2009.

Prior to joining the firm, Mr. Coulom was an internal wholesaler with MetLife and began his career with The Hartford.

Education

- B.A. from the University of Hartford
- FINRA Series 6, 7, 63 and 65 registrations

About Columbia Threadneedle Investments

Columbia Threadneedle Investments is a leading global asset management group that provides a broad range of investment strategies and solutions for individual, institutional and corporate clients around the world.

With more than 2,000 people, including over 450 investment professionals based in North America, Europe and Asia, we manage \$454 billion* of assets across developed and emerging market equities, fixed income, asset allocation solutions and alternatives. We are a top 15 manager of long-term mutual fund assets in the U.S.** and the 4th largest manager of retail funds in the U.K.***

Our priority is the investment success of our clients. We aim to deliver the investment outcomes they expect through an investment approach that is team-based, performance-driven and risk-aware. Our culture is dynamic and interactive. By sharing our insights across asset classes and geographies, we generate richer perspectives on global, regional and local investment landscapes. The ability to exchange and debate investment ideas in a collaborative environment enriches our teams' investment processes. More importantly, it results in better informed investment decisions for our clients.

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* In U.S. dollars as of December 31, 2016. Source: Ameriprise Q4 Earnings Release. Contact us for more current data.

** Source: ICI Complex Assets Report as of December 31, 2016 for Columbia Management Investment Advisers, LLC.

*** Source: Investment Association as of September 2016 for Threadneedle Asset Management Limited.

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