

Portfolio

Banking and Finance Directory



BOULDER COUNTY
**BUSINESS
REPORT**

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PORTFOLIO - FINANCE & INSURANCE DIRECTORY

BANK BRANCHES

ACADEMY BANK - BROOMFIELD

500 Summit Blvd.
Broomfield, CO 80021
303-464-0085
Web site: www.academybankco.com

ACADEMY BANK - LAFAYETTE

745 N. Highway 287
Lafayette, CO 80027
303-665-8357
Web site: www.academybankco.com

ADVANTAGE BANK - BOULDER BRANCH

1611 Canyon Blvd.
Boulder, CO 80302
303-442-0445/303-442-1037
Person in Charge: William J. Unrein and Justine Bartlett
Web site: www.advantagebanks.com

AMERICAN NATIONAL BANK

1360 Walnut St.
Boulder, CO 80302
303-394-5100
Person in Charge: Dennis Nathan
Web site: www.anbank.com

AMFIRST BANK - LONGMONT

900 S. Main St., Suite 101A
Longmont, CO 80501

303-702-9200/303-702-9205
Web site: www.amfirstbank.com

BANK OF THE WEST - BOULDER - ARAPAHOE

3800 Arapahoe Ave.
Boulder, CO 80302
303-444-7771
Web site: www.bankofthewest.com

BANK OF THE WEST - BOULDER - WALNUT

1300 Walnut St.
Boulder, CO 80302
303-449-7200
Web site: www.bankofthewest.com

BANK OF THE WEST - BROOMFIELD

1000 E. 1st Ave.
Broomfield, CO 80020
303-469-1912
Web site: www.bankofthewest.com

BANK OF THE WEST - LONGMONT

700 5th Ave.
Longmont, CO 80501
303-776-3653
Web site: www.bankofthewest.com

BANK OF THE WEST - LONGMONT DRIVE-UP

840 23rd Ave.
Longmont, CO 80501
303-651-3806
Web site: www.bankofthewest.com

BANK OF THE WEST - LOUISVILLE NORTH

865 E. South Boulder Rd
Louisville, CO 80027
303-202-5455
Web site: www.bankofthewest.com

BANK OF THE WEST - NIWOT

97 2nd Ave.
Niwot, CO 80544
303-652-3800
Web site: www.bankofthewest.com

BANK OF THE WEST - SUPERIOR CENTER DRIVE

400 Center Drive
Superior, CO 80027
720-304-0889
Web site: www.bankofthewest.com

CHASE - ARAPAHOE

2500 Arapahoe Ave.
Boulder, CO 80302
303-245-6620
Web site: www.chase.com

CHASE - ARAPAHOE AND 95TH

1426 N. 95th St.
Lafayette, CO 80026
303-666-1008
Web site: www.chase.com

CHASE - BOULDER DOWNTOWN

1301 Canyon Blvd.
Boulder, CO 80302
303-245-6660
Web site: www.chase.com

CHASE - BROOMFIELD

2371 W. 128th Ave.
Westminster, CO 80234
303-244-5108
Web site: www.chase.com

CHASE - GUNBARREL

6300 Gunpark Drive
Boulder, CO 80301
303-245-6510
Web site: www.chase.com

CHASE - LAFAYETTE

200 N. Public Road
Lafayette, CO 80026
303-245-6550

CHASE - LAFAYETTE KING SOOPERS

480 N. Highway 287
Lafayette, CO 80027
303-604-4347
Web site: www.chase.com

CHASE - LONGMONT

1111 S. Hover St.
Longmont, CO 80501
303-651-1388
Web site: www.chase.com

CHASE - LOUISVILLE COLORADO

833 Main St.
Louisville, CO 80027
303-245-6570
Web site: www.chase.com

CHASE - MAIN AND 17TH ALBERTSONS

1750 N. Main St.
Longmont, CO 80501
303-245-6820
Web site: www.chase.com

CHASE - MCCASLIN

578 S McCaslin Blvd.
Louisville, CO 80027
303-245-6532
Web site: www.chase.com

CHASE - SOUTH BOULDER AND 287 ALBERTSONS

555 S. Boulder Road
Lafayette, CO 80026
303-245-6810

CHASE - TABLE MESA

603 S. Broadway
Boulder, CO 80305
303-245-6590
Web site: www.chase.com

COLORADO BUSINESS BANK - BOULDER

2025 Pearl St.
Boulder, CO 80302
303-413-6000
Web site: www.cobizbank.com

COLORADO BUSINESS BANK - BOULDER NORTH

2550 Broadway
Boulder, CO 80304
303-413-6020
Web site: www.cobizbank.com

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400 Centennial Parkway, Suite 100
Louisville, CO 80027
303-661-0969
Web site: www.cobizbank.com



COLORADO CAPITAL BANK
1434 Spruce St., Suite 110
Boulder, CO 80302
303-660-7700
Web site: www.coloradocapitalbank.com



COLORADO STATE BANK & TRUST
1434 Spruce St., Suite 100
Boulder, CO 80302
720-562-5520
Web site: www.csbt.com

COMPASS BANK - BOULDER
3000 Arapahoe Ave.
Boulder, CO 80303
303-938-1313
Web site: www.compassbank.com

COMPASS BANK - GUNBARREL
6685 Gunpark Drive
Boulder, CO 80301
303-581-0123/303-581-0128
Person in Charge: D. Paul Jones, Jr.
Web site: www.compassbank.com

COMPASS BANK - LAFAYETTE
1200 W. South Boulder Road
Lafayette, CO 80026
303-926-1010
Web site: www.compassbank.com

COMPASS BANK - LONGMONT
1849 N. Main St.
Longmont, CO 80501
303-485-7070
Web site: www.compassbank.com

COUNTRYWIDE BANK - BOULDER
2595 Canyon Blvd.
Boulder, CO 80301
303-447-0982
Web site: www.countrywide.com

FIRST COMMUNITY BANK - BOULDER PEARL STREET
2775 Pearl St., Suite 101
Boulder, CO 80302
303-447-0444
Web site: www.fsbnm.com

FIRST COMMUNITY BANK - BOULDER WEST
1900 9th St.
Boulder, CO 80302
720-890-0333
Web site: www.fsbnm.com

FIRST COMMUNITY BANK - BROOMFIELD
5720 W. 120th Ave.

Broomfield, CO 80020
303-460-0333
Web site: www.fsbnm.com

FIRST COMMUNITY BANK - ERIE
785 Cheeseman St.
Erie, CO 80516
303-828-0888
Web site: www.fsbnm.com

FIRST COMMUNITY BANK - LAFAYETTE
811 S. Public Road
Lafayette, CO 80026
303-666-0777
Web site: www.fsbnm.com

FIRST COMMUNITY BANK - LAFAYETTE 95TH STREET
2695 N. Park Drive, Suite 101
Lafayette, CO 80026
303-666-0111
Web site: www.fsbnm.com

FIRST COMMUNITY BANK - LONGMONT
600 Kimbark St.
Longmont, CO 80501
303-776-2727
Web site: www.fsbnm.com

FIRST COMMUNITY BANK - LONGMONT HARVEST JUNCTION
25 E. Ken Pratt Blvd.
Longmont, CO 80501
303-532-3444
Web site: www.fsbnm.com

FIRST COMMUNITY BANK - LONGMONT MAIN
2100 Main St.
Longmont, CO 80501
303-772-0777
Web site: www.fsbnm.com

FIRST COMMUNITY BANK - LOUISVILLE
1020 Century Drive
Louisville, CO 80027
303-666-0666
Web site: www.fsbnm.com

FIRST COMMUNITY BANK - LOUISVILLE MAIN
801 Main St., Suite 130
Louisville, CO 80027
303-664-0444
Web site: www.fsbnm.com

FIRST NATIONAL BANK - BOULDER MAIN BRANCH
3033 Iris Ave.
Boulder, CO 80301
303-443-9090/303-417-4430
Person in Charge: Gene Humphries
Web site: www.1stnationalbank.com

FIRST NATIONAL BANK - BROOMFIELD BRANCH
12009 Sheridan Blvd.
Broomfield, CO 80020
303-443-9090
Web site: www.1stnationalbank.com

FIRST NATIONAL BANK - CANYON BRANCH
1155 Canyon Blvd., Suite 100
Boulder, CO 80302

303-443-9090
Web site: www.1stnationalbank.com

FIRST NATIONAL BANK - FLATIRON CROSSING BRANCH
615 Interlocken Blvd.
Broomfield, CO 80021
303-443-9090
Web site: www.1stnationalbank.com

FIRST NATIONAL BANK - LONGMONT BRANCH
915 S. Hover Road
Longmont, CO 80501
303-443-9090/303-744-6001
Web site: www.1stnationalbank.com

FIRST NATIONAL BANK - LOUISVILLE BRANCH
515 McCaslin Blvd.
Louisville, CO 80027
303-443-9090
Web site: www.1stnationalbank.com

FIRST WESTERN TRUST BANK - BOULDER
1155 Canyon Blvd., Suite 300
Boulder, CO 80302
303-441-9400/303-441-9450
Person in Charge: Becky Cordes

FIRSTBANK NORTH - BROOMFIELD BRANCH
1190 U.S. Highway 287
Broomfield, CO 80020
720-887-1000
Web site: www.efirstbank.com

FIRSTBANK OF BOULDER
6500 Lookout Road
Boulder, CO 80301
303-530-1000/303-581-2538
Person in Charge: Doug Kenkel

FIRSTBANK OF BOULDER - 28TH & PEARL
2835 Pearl St., Suite A
Boulder, CO 80301
720-406-8800
Web site: www.efirstbank.com

FIRSTBANK OF BOULDER - 30TH & ARAPAHOE BRANCH IN KING SOOPERS
1650 30th St.
Boulder, CO 80301
303-237-5000
Web site: www.efirstbank.com

FIRSTBANK OF BOULDER - 95TH & SOUTH BOULDER ROAD BRANCH IN KING SOOPERS
1375 South Boulder Road
Louisville, CO 80027
303-237-5000/303-665-6298

FIRSTBANK OF BOULDER - BROADWAY & ROSEWOOD BRANCH
4520 N. Broadway
Boulder, CO 80304
720-565-1400
Person in Charge: Nicole Mansour
Web site: www.efirstbank.com

FIRSTBANK OF BOULDER - LOUISVILLE BRANCH
500 S. McCaslin Blvd.

Louisville, CO 80027
303-666-0500
Web site: www.efirstbank.com

FIRSTBANK OF BOULDER - SOUTH BOULDER BRANCH
4770 Baseline Road, Suite 100
Boulder, CO 80303-2667
303-499-2200/303-543-3610

FIRSTBANK OF BOULDER - TABLE MESA BRANCH IN KING SOOPERS
3600 Table Mesa Drive
Boulder, CO 80305
303-237-5000
Web site: www.efirstbank.com

FIRSTBANK OF LONGMONT - ERIE BRANCH
512 Briggs St.
Erie, CO 80516
303-828-3393/303-828-4101
Web site: www.efirstbank.com

FIRSTBANK OF LONGMONT - TWIN PEAKS BRANCH
1270 S. Hover St.
Longmont, CO 80501
303-678-7000/303-684-6959
Web site: www.efirstbank.com

FIRSTBANK OF LONGMONT - 17TH & PACE BRANCH IN KING SOOPERS
1611 Pace St.
Longmont, CO 80501
303-485-1100/303-485-2775
Person in Charge: Bruce Robbins
Web site: www.efirstbank.com

FIRSTBANK OF LONGMONT
1707 N. Main St.
Longmont, CO 80501
303-772-5500/303-678-4157
Person in Charge: Bruce Robbins
Web site: www.efirstbank.com

FIRSTIER BANK - BOULDER
2120 Broadway
Boulder, CO 80302
303-464-6680
Web site: www.firstierbank.com

FIRSTIER BANK - CORPORATE OFFICE
555 Eldorado Blvd
Broomfield, CO 80021
303-926-9000
Web site: www.firstierbank.com

FIRSTIER BANK - LOUISVILLE
980 Dillon Road
Louisville, CO 80027
303-926-9000
Web site: www.firstierbank.com

FLATIRONS BANK
5400 Mount Meeker Road
Boulder, CO 80301
303-530-4999/303-530-4735
Person in Charge: Bret Duston
Web site: www.flatironsbank.com

GUARANTY BANK & TRUST CO. - BOULDER SOUTH
2460 Baseline Road
Boulder, CO 80305
303-651-5644
Web site: www.guarantybankco.com

GUARANTY BANK & TRUST CO. - BROOMFIELD
290 Nickel St., Suite 300
Broomfield, CO 80020
303-293-5529
Web site: www.guarantybankco.com

GUARANTY BANK & TRUST CO. - LAFAYETTE
565 W. South Boulder Road
Lafayette, CO 80026
303-651-5644
Web site: www.guarantybankco.com

GUARANTY BANK & TRUST CO. - LONGMONT, DOWNTOWN
401 Main St.
Longmont, CO 80501
303-774-2999
Web site: www.guarantybankco.com

GUARANTY BANK & TRUST CO. - LONGMONT, FOX CREEK
1650 Pace St.
Longmont, CO 80501
720-494-2201
Web site: www.guarantybankco.com

GUARANTY BANK & TRUST CO. - LONGMONT, TWIN PEAKS
1050 S. Hover St.
Longmont, CO 80501
720-494-2201
Web site: www.guarantybankco.com

KEYBANK - BOULDER
2590 Pearl St., Suite 100
Boulder, CO 80302
720-406-6900
Web site: www.key.com

KEYBANK - BROOMFIELD MAIN
88 Lamar St., Suite 100
Broomfield, CO 80020
303-460-7888
Web site: www.usbank.com

KEYBANK - LONGMONT
2361 Clover Basin Drive
Longmont, CO 80503
303-845-2000
Web site: www.key.com

LIBERTY SAVINGS BANK - LONGMONT FINANCIAL CENTER
351 Coffman St., Suite 100
Longmont, CO 80501
303-776-3333/303-776-5333
Web site: www.libertysavingsbank.com

LIBERTY SAVINGS BANK - ROCK CREEK FINANCIAL CENTER
1697 E. Coalton Road, Suite A
Superior, CO 80027
303-494-9200/303-494-9201
Web site: www.libertysavingsbank.com



MILE HIGH BANKS - BOULDER
3002 Bluff St.
Boulder, CO 80301
303-413-0700
Web site: www.milehighbanks.com

PORTFOLIO - FINANCE & INSURANCE DIRECTORY

MILE HIGH BANKS

1726 Hover St.
Longmont, CO 80501
303-684-7350/303-684-8778
Person in Charge: Daniel Allen
Web site: www.bankhorizononline.com

MILE HIGH BANKS - LONGMONT SOUTH

601 S. Main Street
Longmont, CO 80501
303-485-5444
Web site: www.milehighbanks.com

MUTUAL OF OMAHA BANK - NEDERLAND

P.O. Box 69
Nederland, CO 80466
303-258-7071
Web site: www.mutualofomahabank.com

NEW FRONTIER BANK

2315 Main St.
Longmont, CO 80501
303-772-2112
Web site: www.newfrontierbank.com

NORTH VALLEY BANK - BROOMFIELD OFFICE

1210 E. 1st Ave.
Broomfield, CO 80020
303-452-5500/303-345-1045
Web site: www.nvbank.com

PUEBLO BANK & TRUST - BOULDER

2950 Pearl St.
Boulder, CO 80301
303-413-3400/719-545-6946
Person in Charge: Donald Rogers and
Larry Storms
Web site: www.pbandt.com

SUMMIT BANK & TRUST - BROOMFIELD

2002 E. Coalton Road
Broomfield, CO 80027
303-460-4700/303-460-4751
Person in Charge: John P.
Carmichael
Web site: www.summitbt.com

SUMMIT BANK & TRUST - ERIE

199 S. Briggs St.
Erie, CO 80516
303-439-4888/303-439-4899
Web site: www.summitbt.com

U.S. BANK - BOULDER DOWNTOWN OFFICE

1495 Canyon Blvd.
Boulder, CO 80302
303-449-8172
Web site: www.usbank.com

U.S. BANK - BOULDER MAIN OFFICE

1650 28th St., Suite 1244
Boulder, CO 80301
303-444-7017/303-444-2849
Person in Charge: Cheryl Butler
Web site: www.usbank.com

U.S. BANK - BROADLANDS SAFeway OFFICE

3602 W. 144th Ave.
Broomfield, CO 80023
303-635-1158
Web site: www.usbank.com

U.S. BANK - BROOMFIELD OFFICE

6363 W. 120th Ave.

Broomfield, CO 80020
303-460-4660
Web site: www.usbank.com

U.S. BANK - ERIE & SUPERIOR OFFICE

3338 Arapahoe Road
Erie, CO 80516
303-269-8300
Web site: www.usbank.com

U.S. BANK - INTERLOCKEN OFFICE

605 Flatiron Marketplace Drive
Broomfield, CO 80020
720-566-7700
Web site: www.usbank.com

U.S. BANK - LONGMONT 9TH STREET OFFICE

825 Coffman St.
Longmont, CO 80501
303-678-9591
Web site: www.usbank.com

U.S. BANK - LONGMONT COLORADO SAFeway OFFICE

1630 Pace St.
Longmont, CO 80501
720-494-8903
Web site: www.usbank.com

U.S. BANK - LONGMONT OFFICE

436 Coffman St.
Longmont, CO 80501
303-678-9591
Web site: www.usbank.com

U.S. BANK - LOUISVILLE COLORADO ALBERTSONS OFFICE

910 W. Cherry Ave.
Louisville, CO 80027
303-604-9872
Web site: www.usbank.com

U.S. BANK - MIRAMONTE KING SOOPERS OFFICE

1150 State Highway 287
Broomfield, CO 80020
303-410-8194
Web site: www.usbank.com

U.S. BANK - NELSON & HOVER - KING SOOPERS OFFICE

995 S. Hover Road
Longmont, CO 80501
303-485-9316
Web site: www.usbank.com

U.S. BANK - SOUTH BOULDER ROAD SAFeway OFFICE

707 South Boulder Road
Louisville, CO 80027
720-890-3891
Web site: www.usbank.com

UNITED WESTERN BANK - BOULDER

1601 28th St.
Boulder, CO 80302
303-998-2680
Web site: www.uwbank.com



VALLEY BANK & TRUST - LOUISVILLE

511 E. South Boulder Road
Louisville, CO 80027

303-666-0906/303-666-0989
Person in Charge: Bruce Clark
Web site: www.valleybankandtrust.com



VALLEY BANK AND TRUST - LYONS

304 2nd Ave.
Lyons, CO 80540
303-823-6668/303-449-1930
Person in Charge: Bruce Clark
Web site: www.valleybankandtrust.com

VECTRA BANK - BOULDER BROADWAY

2696 Broadway
Boulder, CO 80304
720-947-8400/720-947-8410
Web site: www.vectrabank.com

VECTRA BANK - BOULDER PEARL

1700 Pearl St.
Boulder, CO 80302
720-947-8450/720-947-8427
Person in Charge: Gay E. Kuhlmann
Web site: www.vectrabank.com

VECTRA BANK - BROOMFIELD

1990 West 10th Ave.
Broomfield, CO 80020
720-947-8275
Web site: www.vectrabank.com

VECTRA BANK - LONGMONT

2011 Ken Pratt Blvd.
Longmont, CO 80501
720-947-8470
Web site: www.vectrabank.com

WASHINGTON MUTUAL - 28TH & IRIS FINANCIAL CENTER

3325 28th St.
Boulder, CO 80301
303-444-0792
Web site: www.wamu.com

WASHINGTON MUTUAL - 30TH & WALNUT FINANCIAL CENTER

1880 30th St.
Boulder, CO 80301
303-449-3361
Web site: www.wamu.com

WASHINGTON MUTUAL - BROOMFIELD TOWN CENTER FINANCIAL CENTER

1275C E. 1st Ave.
Broomfield, CO 80020
303-438-9538
Web site: www.wamu.com

WELLS FARGO - BOULDER

1242 Pearl St.
Boulder, CO 80302
303-441-0355/303-441-0392
Person in Charge: Richard M.
Kovacevich
Web site: www.wellsfargo.com

WELLS FARGO - BOULDER CANYON

1690 Canyon Blvd.
Boulder, CO 80302
303-441-0341
Web site: www.wellsfargo.com
WELLS FARGO - BROOMFIELD
2 Garden Center

Broomfield, CO 80020
303-465-6740
Web site: www.wellsfargo.com

WELLS FARGO - EAST BOULDER

3289 Arapahoe Ave.
Boulder, CO 80303
720-565-8804
Web site: www.wellsfargo.com

WELLS FARGO - FLATIRON CROSSING

598 Summit Blvd.
Broomfield, CO 80021
720-566-4975
Web site: www.wellsfargo.com

WELLS FARGO - KEN PRATT & PARKWAY

1050 Ken Pratt Blvd.
Longmont, CO 80501
303-485-8630
Web site: www.wellsfargo.com

WELLS FARGO - LONGMONT

2255 Main St.
Longmont, CO 80501
800-869-3557
Web site: www.wellsfargo.com

WELLS FARGO - LONGMONT

635 Coffman St.
Longmont, CO 80501
303-682-2068
Web site: www.wellsfargo.com

WELLS FARGO - LONGMONT SOUTH

399 S. Hover St.
Longmont, CO 80501
303-682-4560
Web site: www.wellsfargo.com

WELLS FARGO - NORTH BOULDER

3307 30th St.
Boulder, CO 80301
303-448-3784
Web site: www.wellsfargo.com

WELLS FARGO - STANDLEY LAKE

10001 Wadsworth Parkway
Westminster, CO 80021
303-438-4020
Web site: www.wellsfargo.com

WELLS FARGO BANK - LOUISVILLE

1137 South Boulder Road
Louisville, CO 80027
303-441-0379/303-604-0579
Web site: www.wellsfargo.com

CERTIFIED PUBLIC ACCOUNTANTS

A.F. GEBAUER & CO. PC

752 17th Ave.
Longmont, CO 80501
303-772-6180/303-772-6131

A.F. GEBAUER & CO. PC

4880 Riverbend Road
Boulder, CO 80301
303-449-1842/303-772-6131

ANDERSON DERR CPAS PC

825 Delaware Ave., Suite P203
Longmont, CO 80501
303-772-0621/303-772-0646
Areas of specialty/services: Indi-
vidual and small-business tax.
Managing partners: Steve Anderson
and Ray Derr

BEDELL & ASSOCIATES PC

4855 Riverbend Road, Suite 200
Boulder, CO 80301
303-440-8866/303-402-9040
Areas of specialty/services: Tax
returns, planning and business opera-
tions consulting, QuickBooks consult-
ing. Choice of entity planning.
Managing partners: Rick Bedell
Web site: www.rmbedell.com

BETTY ANN CASTLEBERRY CPA

1285 Albion Road
Boulder, CO 80305
303-444-6690/303-499-1071
Areas of specialty/services: Tax
management and consulting.
Managing partners: Betty Ann
Castleberry

BOULDER BUSINESS ADVISORS, PC.

1221 Pearl St.
Boulder, CO 80302
303-449-9222/303-443-6635
Areas of specialty/services: Quick-
Books based bookkeeping, small busi-
ness accounting, and P-T CFO services.
High income/net worth individuals and
professional service companies.

BRAD BORNCAMP LLC

1319 West Baseline Road, Suite 201
Lafayette, CO 80026
303-530-4650/303-530-4971
Areas of specialty/services: Tax
accounting, estate and financial planning.
Managing partners: Brad Borncamp

BRETT R. SMITH CPA WEALTH MANAGEMENT, LLC

1285 Cimarron Drive, Suite 202
Lafayette, CO 80026
303-604-0505/303-604-0488
Areas of specialty/services: Tax
preparation, planning and strategies,
personal and business financial plan-
ning, investment management.
Managing partners: Brett R. Smith
Web site: www.brettrsmithassoc.com

BROCK AND CO. CPAS PC

1930 17th St., Suite 200
Boulder, CO 80302
303-444-2971/303-444-0869
Areas of specialty/services: Manu-
facturing, construction, high net worth
individuals, estates, trusts, real estate,
business acquisition, distribution, trans-
portation, financing, profit improvement
services, fraud investigation.
Managing partners: Mark Kaufmann
Web site: www.brockcpas.com

BROCK AND CO. CPAS PC

900 S. Main St., Suite 200
Longmont, CO 80501
303-776-2160/303-776-2431
Web site: www.brockcpas.com

Unpredictable cycles.
Market anomalies.
Risky trends...

...Shhhhhh.

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Web site: http://swirescpa.com/Services

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Web site: www.hwacpas.com

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Managing partners: John L. Griffin
Web site: www.jlgcpa.com

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Web site: www.daytradertax.com

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Web site: www.blackadarcpa.com

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Web site: www.ncoppomcpa.com

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Managing partners: Randall C. Bartlett

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Managing partners: Sylvia Manrique Chaney, C.P.A.

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Managing partners: Thomas E. Healy
Web site: www.tomhealycpa.com

VERNON L. MORRIS CPA

1136 Pearl St.
 Boulder, CO 80302
 303-442-6538/303-444-4034

Areas of specialty/services: Taxation, oil and gas, real estate, business valuation.

Managing partners: Vernon L. Morris

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Web site: www.wxwax.com

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Web site: www.wendellwalkercpa.com

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Web site: www.westaccounting.net

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WILLIAM H. BICKELL CPA

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Boulder, CO 80301
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Managing partners: William H. Bickell

WILLIAM L. BROOKS CPA

4720 Table Mesa Drive, Suite B-100
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303-447-1626/303-447-1906
Areas of specialty/services: Tax management and consulting.
Managing partners: William L. Brooks
Web site: www.billbrookscpa.com

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Managing partners: Craig Hayward and James A. Windholz

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BOULDER MUNICIPAL EMPLOYEES FEDERAL CREDIT UNION

2800 Arapahoe Ave.
Boulder, CO 80303
303-441-7800

Principal: Ann Babiak
Web site: www.bmecu.org

BOULDER VALLEY CREDIT UNION

5505 Arapahoe Ave.
Boulder, CO 80303
303-442-8850
Principal: Rick Allen
Web site: www.bvccu.org

BOULDER VALLEY CREDIT UNION - BROADWAY

2667 Broadway
Boulder, CO 80304
303.449.3551/303.449.0438
Principal: Rick Allen
Web site: www.bvccu.org

BOULDER VALLEY CREDIT UNION - LOUISVILLE

800 Coal Creek Circle
Louisville, CO 80027
720.890.0404/720.890.0407
Principal: Rick Allen
Web site: www.bvccu.org

COLORADO UNITED CREDIT UNION

5155 W. 120th Ave.
Broomfield, CO 80020
303-428-9571
Principal: Branda D. Abbott
Web site: www.coloradounitedcu.org

COMMUNITY FINANCIAL FEDERAL CREDIT UNION

6855 W. 119th Ave.

Broomfield, CO 80038
303-469-5366
Principal: Jan Billotti
Web site: www.yourlocalcreditunion.com

EAGLE LEGACY CREDIT UNION

1100 U.S. Highway 287, Suite A800
Broomfield, CO 80020
303-431-3408
Principal: Sundie L. Seefried
Web site: www.eaglelegacy.org



ELEVATIONS CREDIT UNION

2960 Diagonal Highway
Boulder, CO 80301
303-443-4672
Fax - 303.443.0387
Web site: www.elevationscu.com

ELEVATIONS CREDIT UNION - BOULDER BASELINE BRANCH

4760 Baseline Road, Suite A
Boulder, CO
303.443.4672/720.304.6432
Web site: www.elevationscu.com

ELEVATIONS CREDIT UNION - BOULDER TABLE MESA BRANCH

607 South Broadway, Suite E
Boulder, CO
303.443.4672/ 303.494.0256
Web site: www.elevationscu.com

COLORADO CAPITAL BANK

BOULDER

Bankers Who Understand Your Business

Colorado Capital Bank is a bank for business.

We are committed to the financial success of our business clients and invite you to experience banking the way it should be...focused on you and your business.

COMMERCIAL LENDING
CONSTRUCTION LENDING
TREASURY MANAGEMENT SERVICES
NONPROFIT BANKING
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PRIVATE WEALTH MANAGEMENT



Jake Puzio
President
303.660.7707



Jeff Stiffler
Senior Vice President -
Loan Officer
303.660.7704



Allison Closson
Vice President -
Loan Officer
303.660.7711



Bill Fanning
Vice President -
Construction Loans
303.660.7703



Robert Haas
Vice President -
Loan Officer
303.660.7702



Boni Sandoval
Vice President -
Loan Officer
303.660.7709



Roxana Phelps
Vice President
303.660.7706



Amanda Freeberg
AVP-Treasury
Management
303.660.7713



Abby Hardin
Mortgage Loan
Consultant
303.905.0545

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In 1908 our bank was opened by a financier and businessman who saw the potential for knowledgeable, personalized banking services in a growing Denver.

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www.coloradocapitalbank.com



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PORTFOLIO - FINANCE & INSURANCE DIRECTORY

ELEVATIONS CREDIT UNION - BOULDER UMC BRANCH

1669 Euclid Avenue, Suite 143
Boulder, CO
303.443.4672/ 303.449.4027
Web site: www.elevationscu.com

ELEVATIONS CREDIT UNION - BOULDER/WESTMINSTER BRANCH

4750 W. 120th Ave Unit #700
Westminster, CO
303.443.4672/ 303.466.8746
Web site: www.elevationscu.com

ELEVATIONS CREDIT UNION -BROOMFIELD/ERIE BRANCH

3140 Village Vista Drive, Suite 104
Erie, CO
303.443.4672/ 303.666.6867
Web site: www.elevationscu.com

ELEVATIONS CREDIT UNION - LAFAYETTE BRANCH

1900 W. South Boulder Rd.
Lafayette, CO
303.443.4672/ 303.604.1156
Web site: www.elevationscu.com

ELEVATIONS CREDIT UNION - LONGMONT HOVER BRANCH

1079 S. Hover, Suite 100
Longmont, CO
303.443.4672/ 303.682.2797
Web site: www.elevationscu.com

ELEVATIONS CREDIT UNION - LONGMONT MAIN STREET BRANCH

2101 N. Main St.
Longmont, CO
303.443.4672/ 303.702.0938
Web site: www.elevationscu.com

INDIANA MEMBERS CREDIT UNION

4895 Riverbend Road, Suite E
Boulder, CO 80301
303-938-9812
Principal: Ron Collier
Web site: www.imcu.com

NORBEL CREDIT UNION

1 Garden Center
Broomfield, CO 80020
303-776-0511
Principal: Edwin R. Bigby Jr.
Web site: www.norbel.org

PREMIER MEMBERS FEDERAL CREDIT UNION

5495 Arapahoe Ave.
Boulder, CO 80303
303-449-9600
Principal: Thomas N. Evers
Web site: www.premiermembers.org

ST. VRAIN VALLEY CREDIT UNION

777 21st Ave.
Longmont, CO 80501
303-772-7776
Principal: Eva D. Gaudio
Web site: www.svvcu.org

INSURANCE

AETNA HEALTH INC.
6430 S. Fiddler's Green Circle

Englewood, CO 80111
303-793-2500/303-793-2509
Parent company: Aetna Inc.
Headquarters: Hartford, Conn.
Plans: HMO, Indemnity, POS, PPO
Person in charge: John Stockton,
Accounts manager and Director of
Business Development
Year founded: 1987
Web site: www.aetna.com

ANTHEM BLUE CROSS AND BLUE SHIELD

700 Broadway St.
Denver, CO 80273-0002
303-831-5899/303-764-7254
Parent company: WellPoint Inc.
Headquarters: Indianapolis, Ind.
Plans: HMO, Indemnity, POS, PPO
Person in charge: John Martie, CEO and
President
Year founded: 1938
Web site: www.anthem.com

CIGNA HEALTHCARE OF COLORADO INC.

3900 E. Mexico Ave., Suite 1100
Denver, CO 80210
800-245-2471/303-691-3142
Parent company: CIGNA Corp.
Headquarters: Philadelphia
Plans: HMO, Indemnity, POS, PPO
Person in charge: Daryl Edmonds,
General Manager and President
Year founded: 1986
Web site: www.cigna.com

COLORADO ACCESS

10065 E. Harvard Ave., Suite 600
Denver, CO 80231
720-744-5100/303-751-9048
Headquarters: Denver
Plans: HMO
Person in charge: Marshall Thomas,
CEO and President
Year founded: 1994
Web site: www.coaccess.com

DELTA DENTAL PLAN OF COLORADO

4582 S. Ulster St., Suite 800
Denver, CO 80237
303-741-9300/303-741-9338
Parent company: Delta Dental
Headquarters: Denver
Plans: PPO
Person in charge: Kathryn Paul, CEO
and President
Year founded: 1958
Web site: www.deltadentalco.com

DENVER HEALTH

777 Bannock St.
Denver, CO 80204
303-436-6000/303-436-3885
Headquarters: Denver
Plans: HMO, POS
Person in charge: Douglas L. Clink-
scales, CEO
Year founded: 1860
Web site: www.denverhealth.org

GREAT-WEST HEALTHCARE

8515 E. Orchard Road
Greenwood Village, CO 80111
800-537-2033/303-773-0938
Headquarters: Greenwood Village
Plans: PPO

Person in charge: Rick Rivers, Execu-
tive Vice President
Year founded: 1996
Web site: www.greatwesthealthcare.com

HUMANA INC.

8400 E. Prentice Ave., Suite 1400
Greenwood Village, CO 80111
800-558-4444/303-694-1105
Headquarters: Louisville, Ky.
Plans: HMO, PPO
Person in charge: Dan Oftedahl,
President, Humana of Colorado
Year founded: 1961
Web site: www.humana.com

KAISER PERMANENTE COLORADO

10350 E. Dakota Ave.
Denver, CO 80247
303-338-3800/303-344-7277
Headquarters: Oakland, Calif.
Plans: HMO, POS, PPO
Person in charge: Donna Lynne,
President
Year founded: 1969
Web site: www.kaiserpermanente.org

ROCKY MOUNTAIN HEALTH PLANS

2775 Crossroads Boulevard
Grand Junction, CO 81506
970-244-7760/970-244-7880
Headquarters: Grand Junction
Plans: HMO, Indemnity, POS, PPO
Person in charge: John Hopkins, CEO
and President
Year founded: 1974
Web site: www.rmhp.org

UNITED HEALTHCARE INSURANCE CO.

6465 S. Greenwood Plaza Blvd., Suite 300
Centennial, CO 80111
303-267-3300/303-267-3597
Parent company: United Health Group Inc.
Headquarters: Minnetonka, Minn.
Plans: HMO, PPO
Person in charge: Elizabeth Soberg, CEO
Year founded: 1974
Web site: www.unitedhealthcare.com

INVESTMENT ADVISERS

A.G. EDWARDS & SONS INC.

1900 9th St., Suite 200
Boulder, CO 80302
303-449-2800/303-449-0920
Services offered: Full-service broker-
age firm, offering a complete spectrum
of financial products and services,
including stocks, bonds, mutual funds,
tax-advantaged investments.
Person in Charge: Dennis Kaboth,
Branch Manager
Year Founded: 1887
Web site: www.agedwards.com

ADVANCED FINANCIAL CONSULTANTS

3050 Broadway Suite 202
Boulder, CO 80304
303-444-1161/303-444-5291

AGILE GROUP

4909 Pearl East Circle

Boulder, CO 80301
303-440-6500/303-247-0476
Services offered: Financial planning
consultants.
Web site: www.agile.com

AGILE WEALTH MANAGEMENT

4909 Pearl East Circle, Suite 300
Boulder, CO 80301
303-440-6500/303-440-9712
Services offered: Investment, retire-
ment, estate, insurance, tax, college
and business planning.
Person In Charge: Neal Greenberg,
Founder
Year Founded: 1987
Web site: www.agilewealth.com

AMERICAN EXPRESS FINANCIAL ADVISORS

4440 Arapahoe Ave., Suite 120
Boulder, CO
303-442-0123
Person In Charge: Gregory Parr, C.F.P.

AMG NATIONAL TRUST BANK

1155 Canyon Blvd., Suite 310
Boulder, CO 80302
888-547-8877/303-447-8822
Web site: www.amgnational.com

AN INVESTOR'S ADVOCATE

2129 13th St., Suite G
Boulder, CO 80302
303-444-1495
Services offered: Fee-base retire-
ment planning, investment analysis.
Person In Charge: Mathias Thurmer, C.F.P.

BATHGATE CAPITAL PARTNERS LLC

1906 13th St., Suite 300
Boulder, CO 80302
303-449-7994/303-402-0596
Services offered: Stock, bond broker-
age business, mutual funds.
Person In Charge: Doug Ray, Branch
Manager
Year Founded: 1995
Web site: www.bathgatepartners.com

BAYDUSH SIMON WEAVER

2336 Pearl St., Suite 100
Boulder, CO 80302
303-444-9696/303-444-8585
Services offered: Independent, fee-
only boutique firm working with afflu-
ent families and individuals to grow
money and solve problems. Core com-
petencies include sophisticated asset
allocation and cutting edge sustainable
investment portfolios.
Person In Charge: Debi Baydush,
Drew S Simon and Ben Weaver
Year Founded: 1992
Web site: www.baydushsimonweaver.com

BIVIO INC.

2701 Iris Ave., Suite 5
Boulder, CO 80304
303-417-0919/303-247-0073
Services offered: Online investment
club management.
Person In Charge: Ion Yadigaroglu,
CEO and Co-Founder
Year Founded: 1999
Web site: www.bivio.com

BOULDER CAPITAL MANAGEMENT

P.O. Box 7249
Boulder, CO 80304
303-417-0052
Services offered: Registered invest-
ment advisor. Fee-only financial plan-
ning, private money management and
business consulting.
Person In Charge: Harry Stam, C.F.A., C.F.P.
Year Founded: 1995
Web site:
www.bouldercapitalmanagementllc.com

BRETT R. SMITH CPA WEALTH MANAGEMENT LLC

1285 Cimarron Drive, Suite 202
Lafayette, CO 80026
303-604-0505/303-604-0488
Services offered: Financial planning,
retirement planning, tax planning,
investment planning.
Person In Charge: Brett R. Smith
Year Founded: 1989
Web site: www.brettrsmithassoc.com

BUSINESS FINANCIAL STRATEGIES

5380 Centennial Trail
Boulder, CO 80303
303-442-4780/303-415-0773
Services offered: Goal identification and
planning, cash flow management and
planning, risk management and insurance
planning, investment planning.
Person In Charge: Jim Burton, C.F.P.
and President
Year Founded: 1993
Web site: www.bfsmedia.com

CANDYCE I. WITHER LLC

507 Canyon Blvd.
Boulder, CO 80303
303-442-9049
Person In Charge: Candyce Wither

CAP ADVISORS LLC

2960 Center Green Court., Suite 100
Boulder, CO 80301-5406
303-444-7161/303-444-4927
Services offered: Financial consul-
tant, estate planner.
Person In Charge: John F Truhlar,
Ch.FC., M.S.F.S. and Manager
Year Founded: 1981

CASCADE FINANCIAL MANAGEMENT

1420 28th St.
Boulder, CO 80303
303-440-9596/303-440-9670

CE CAMPBELL & ASSOCIATES

1410 Cherryvale Rd
Boulder, CO 80303
303-440-3556/303-443-9177
Services offered: Investment plan-
ning, financial planning, college plan-
ning, tax preparation
Person In Charge: Corrin Campbell, CFP,
President
Year Founded: 1994
Web site: www.ccampbellassociates.com

CENTENNIAL INVESTMENT MANAGEMENT

2060 Broadway, Suite 400
Boulder, CO 80302
303-444-0206/303-444-7968

PORTFOLIO - FINANCE & INSURANCE DIRECTORY

CENTER FOR RESPONSIBLE INVESTING / LEONARD FINANCIAL LTD.

1301 Canyon Blvd., Suite 220
Boulder, CO 80302-5384
303-449-5760/303-444-7861
Services offered: A comprehensive, professional and independent financial consulting firm for individuals, families, business and nonprofits with a focus on socially responsible investing.
Person In Charge: Kathleen Leonard, President
Year Founded: 1993
Web site: www.leonardfinancial.com

CHANNER DARMOUR YANARI LLC

1728 16th St., Suite 201
Boulder, CO 80302
303-545-5400/303-545-5640
Services offered: Trust services, investment management, financial planning, charitable giving strategies and option and hedging strategies.
Person In Charge: Dennis Channer, C.P.A., C.F.P.; David Darmour, C.I.M.A., C.F.P. and Thomas Yanari
Year Founded: 2001
Web site: www.privatewealthmgt.com

CHARLES SCHWAB & CO. INC.

2480 Canyon Blvd.
Boulder, CO 80302
303-448-3520/303-448-3538
Services offered: Full-service investment firm.
Person In Charge: Stuart Olsen, Manager
Year Founded: 1974
Web site: www.schwab.com

COLORADO CAPITAL MANAGEMENT INC.

1401 Walnut St.
Boulder, CO 80302
303-444-9300/303-444-2027
Services offered: Investment management, financial planning.
Person In Charge: Steven Ellis, President
Year Founded: 2000
Web site: www.coloradocap.com

CORNERSTONE HOLDINGS

11001 W. 120th Ave., Suite 310
Broomfield, CO 80021
303-410-2510
Web site: www.cstoneholdings.com

CRESTONE CAPITAL ADVISORS LLC

1050 Walnut St., Suite 402
Boulder, CO 80302
303-442-4447
Services offered: Investment management, estate planning, philanthropic planning, income tax planning and reporting, and wealth preservation and asset protection advisory services.
Web site: www.crestonecap.com

CULVER & COMPANY INC.

360 Interlocken Blvd., Suite 104
Broomfield, CO 80020
303-442-3670/303-442-1749
Services offered: Financial planning and management.

DAN BERECK, C.F.P.

1919 14th St.
Boulder, CO 80302

303-440-9194
Person In Charge: Dan Bereck, C.F.P.

DANIEL M. DAY & ASSOCIATES

2060 Broadway, Suite 310
Boulder, CO 80304
303-444-8840/303-444-6796
Services offered: Fee-based financial and wealth management planning. Northwestern Mutual wealth management advisor.
Person In Charge: Daniel Day, Ch.F.C., C.L.U.
Year Founded: 1981
Web site: www.danday.com

DAWSON YOUNG & THOMAS LLC

1942 Broadway
Boulder, CO
303-323-4293

DHARMA INVESTMENT GROUP LLC

737 29th St., Suite 300
Boulder, CO 80303
303-444-4222
Web site: www.dharmainvestmentgroup.com

DIGITAL RETIREMENT SOLUTIONS INC.

2420 Trade Centre Ave.
Longmont, CO 80503
303-485-9000/303-485-9009
Services offered: Online programs and support for retirement planning.
Web site: www.drs401k.com

DIVERSIFIED ASSET MANAGEMENT INC.

1113 Spruce St.
Boulder, CO 80302
303-440-2906
Services offered: Wealth management for successful executives and small business owners in the front-range who want to make a seamless transition to a sustainable enjoyable retirement.
Person In Charge: Robert Pyle, C.F.P., C.F.A. and President
Year Founded: 1996
Web site: www.diversifiedassetmanagement.com

DON GARRAMONE

62 Benthaven Place
Boulder, CO 80305
303-543-5796

DUTCH CREEK FINANCIAL SERVICES

1790 30th St., Suite 230
Boulder, CO 80301
303-440-1400/303-449-1702
Services offered: Investment advice, professional mortgage planning, insurance financial planning.
Person In Charge: John Regur, President
Year Founded: 2001
Web site: www.dcfinancialservices.net

E. PAUL LEV-ARY & ASSOCIATES

2291 Arapahoe Ave.
Boulder, CO 80302
303-440-4275/303-443-6663
Person In Charge: Paul Lev-Ary, Owner
Year Founded: 1982
Web site: www.lev-ary.com

EDWARD JONES INVESTMENTS

Boulder County

Boulder, CO 80302
303-440-7885/888-759-8089
Services offered: Full-service brokerage firm specializing in stocks, bonds, mutual funds, IRAs, tax-free investment, annuities and insured CDs.
Person In Charge: Jason Espy, Regional Leader
Year Founded: 1871
Web site: www.edwardjones.com

ELLIOTT FINANCIAL LLC

477 Whitetail Circle
Lafayette, CO 80026
303-926-8802
Services offered: Financial planning consultants.

FIDELITY INVESTMENTS

281 E. Flatiron Circle
Broomfield, CO 80021
303-460-7224
Services offered: Accounts and trade, retirement and guidance, investment products.
Web site: www.fidelity.com

FINANCIAL MOUNTAIN INC.

1705 14th St., Suite 195
Boulder, CO 80302
303-442-4390
Services offered: Full-service financial planning and wealth-management firm.
Person In Charge: Robert Zimberg
Year Founded: 1990
Web site: www.financialmountainonline.com

FINANCIAL PLANNING AND IMPLEMENTATION CORP.

2995 Center Green Court South, Suite A
Boulder, CO 80301
303-444-1818/303-444-1852

FIRST ALLIED SECURITIES INC.

6684 Gunpark Drive, Suite 1500
Boulder, CO 80301
303-530-7717/303-527-0365
Services offered: Investment advisory, financial planning, managed money, traditional brokerage.
Person In Charge: Bob Webster, Manager
Year Founded: 1990
Web site: www.firstallied.com

FIRST FINANCIAL GROUP OF COLORADO

895 Eldorado Ave.
Nederland, CO 80466
303-939-9856
Services offered: Financial planning.
Person In Charge: Roy Ludwick, Owner

FIRST NATIONAL BANK OF COLORADO INVESTMENT MANAGEMENT & TRUST

1155 Canyon Blvd., Suite 210
Boulder, CO 80302
303-938-5601/303-417-4116
Services offered: Financial planning, investment management, trust and estate services, retirement plans.
Person In Charge: Alden Sherman
Year Founded: 1973
Web site: www.fnbonline.com

FOCUSED FINANCIAL PLANNING INC.

1615 Pearl St., Suite B
Boulder, CO 80302
303-544-0222/720-294-9542
Services offered: Fee-only financial management. Asset management and building, IRA rollovers and asset preservation. Specializing in small business including small business consulting and taxes.
Person In Charge: Patrick Peterhans, C.F.P.
Year Founded: 1997
Web site: www.focusedfinancialplanning.com; www.Ask-a-Financial-Planner.com

GARY S. BEDFORD FINANCIAL SERVICES

7850 Edelwiess Court
Boulder, CO 80303
303-499-8800/303-499-7300
Person In Charge: Gary Bedford, Ch.F.C.

GATES FINANCIAL SERVICES INC.

2240 Champlain Drive
Boulder, CO 80301
720-890-4991
Services offered: Tax strategies, financial planning, investment management.

GENERATION CAPITAL MANAGEMENT

50 S. Steele Street #480
Denver, CO 80209
303-996-6212
Services offered: Retirement planning
Person In Charge: Teri Stary

GOLD MEDAL WATERS INC.

4845 Pearl East Circle
Boulder, CO 80301
720-887-1299/720-208-0605
Services offered: Wealth management (entrepreneurs, small firm medical practices and professional athletes), retirement income distribution planning (retirees), retirement plan setup (plan sponsors).
Person In Charge: Matthew Kelley, C.F.P., A.I.F., A.A.M.S.
Year Founded: 2004
Web site: www.goldmedalwaters.com

H & R BLOCK CO.

1800 Broadway St., Suite 110
Boulder, CO 80302
720-565-9833/720-565-9823
Services offered: Financial, retirement, education and estate planning. Stock, bond and mutual fund brokerage, 1031 exchanges, annuities, personal and business life insurance.
Person In Charge: Stan Benson, Branch Manager
Year Founded: 1999
Web site: http://hrblock.com

H&R BLOCK FINANCIAL ADVISORS

1800 Broadway, Suite 110
Boulder, CO 80302
720-565-9820
Person In Charge: Don Furuya, Associate Vice President of Investments
Web site: www.hrblock.com

HARSHMAN WEALTH MANAGEMENT LLC

360 Interlocken Blvd., Suite 101
Broomfield, CO 80021
303-442-2138/303-443-0035

Person In Charge: Shawn D. Harshman, Founder and Partner
Year Founded: 2005

JIM MARTY AND ASSOCIATES LLC

1714 Duchess Drive
Longmont, CO 80501
303-651-0304/303-651-1471
Services offered: Financial services, retirement, estate and tax planning strategies.
Person In Charge: Jim Marty
Year Founded: 1984

KYDE CAPITAL STRATEGIES LLC

1911 11th St., Suite 207
Boulder, CO 80302
303-443-6644/303-443-7755
Services offered: Comprehensive financial planning, investment management, wealth management, individual portfolio design.
Person In Charge: Greg Kyde, C.F.P., Ch.F.C.
Year Founded: 1996
Web site: www.kydecap.com

LAURIE HYLAND C.F.P.

737 29th St., Suite 100
Boulder, CO 80303
303-444-5440
Person In Charge: Laurie Hyland, C.F.P.
Web site: www.lpl.com

LIGHTHOUSE FINANCIAL LLC

360 Interlocken Blvd., Suite 101
Broomfield, CO 80021
303-444-1818
Services offered: Investment advisory firm, providing financial planning, estate planning and asset management services.
Person In Charge: J. Lynn Hinds, Owner
Year Founded: 1999
Web site: www.lighthousefinancial.biz

LINSCO/PRIVATE LEDGER FINANCIAL SERVICES

1617 Coalton Road #145
Superior, CO 80027
303-938-9100
Services offered: LPL represents a national network of more than 5,000 independent investment professionals-business owners assisting clients with financial goals.
Person In Charge: Donald R. DuVarney, Branch Manager
Year Founded: 1972
Web site: www.lpl.com

LPL FINANCIAL SERVICES

4450 Arapahoe Ave #100
Boulder, CO 80303-9102
303-442-8000/303-442-0888

LUNSFORD FINANCIAL PLANNING INC.

357 S. McCaslin Blvd., Suite 200
Louisville, CO 80027
303-666-6442/303-926-0336
Services offered: Fee-only financial planning, investment advice and tax preparation.
Person In Charge: Shannon Lunsford, C.F.P.
Year Founded: 2003
Web site: www.LunsfordFinancial.com

PORTFOLIO - FINANCE & INSURANCE DIRECTORY

MARTY, LYLE, DOTY AND JONES LLC - BOULDER

4999 Pearl East Circle, Suite 300
Boulder, CO 80301
303-440-0399/303-440-5073
Services offered: Financial services, retirement, estate and tax planning strategies.
Person In Charge: Jim Marty
Year Founded: 1984
Web site: www.mldjcpa.com

MBA FINANCIAL SERVICES LLC

1634 Walnut St., Suite 111
Boulder, CO 80302
303-584-6827
Services offered: Investment planning firm, providing financial planning, estate planning and portfolio management services.
Person In Charge: Michael Banks, M.B.A.
Year Founded: 1989

MCNARY FINANCIAL PLANNING LLC

14597 Benton St., Suite 200
Broomfield, CO
303-410-1745
Services offered: Fee-only comprehensive financial planning for middle-income families. Incorporates investment analysis, strategy and coordination of implementation, tax planning, insurance review budgeting and estate planning. All services are based on life goals established by clients. No product sales. No commissions.
Person In Charge: Judy McNary, Founder
Year Founded: 2007
Web site: www.mcnaryfinancial.com

MERIDIAN WEALTH MANAGEMENT

5377 Manhattan Circle, Suite 203
Boulder, CO 80303
720-274-1656/720-274-1663
Services offered: Portfolio management and retirement planning.
Person In Charge: David Hansen
Year Founded: 2005
Web site: www.meridianteam.com

MERRILL LYNCH

921 Walnut St., 1st Floor
Boulder, CO 80302
303-938-3900/303-938-3999
Services offered: All financial services.
Person In Charge: John Oliver, Resident Manager
Year Founded: 1895
Web site: www.ml.com

MORGAN STANLEY

1300 Walnut St., Suite 204
Boulder, CO 80302
720-562-6200/303-939-9007
Services offered: Full-service financial firm: personal financial planning to global investment banking.
Person In Charge: Joseph Jaensen, Colorado Complex Manager
Year Founded: 1924
Web site: www.morganstanley.com

NEIDIGER TUCKER BRUNER INC.

1911 11th St., Suite 303
Boulder, CO 80302
303-440-0170/413-643-8038
Services offered: Stock, bond broker-

age business, 401k set up.
Person In Charge: Tim Beaschler, Branch Manager
Year Founded: 1985
Web site: www.ntbinc.com
NOEL FINANCIAL INC.
777 29th St. Suite 200
Boulder, CO 80303
303-415-9122
Person In Charge: Amy Noel
Web site: www.noelfinancialinc.webyip.net

PARAGON CAPITAL WEALTH MANAGEMENT

1426 Pearl St., Suite 200
Boulder, CO 80302
303-443-1510/303-443-1575
Services offered: Private wealth management firm specializing in retirement distribution planning and execution, estate planning and generational wealth transfer, Trust set up and management.
Person In Charge: Duke O'Neil
Year Founded: 2005

PEAK ASSET MANAGEMENT LLC

1371 E. Hecla Drive, Suite A
Louisville, CO 80027
303-926-0100/303-926-0098
Services offered: Wealth management, portfolio management, financial planning.
Person In Charge: Terrance W. Hefty, Founder
Year Founded: 1994
Web site: www.peakam.com

PRINCIPLED INVESTING LLC

P.O. Box 1837
Boulder, CO 80306-1837
303-413-6025/888-220-7510
Services offered: Financial services and investment advice. Specializing in socially responsible investing.
Person In Charge: Krista Stroffner, Financial Adviser
Year Founded: 2005
Web site: www.principledinvestingllc.com

RANDALL L. KRYSZAK PC

4845 Pearl East Circle, Suite 101
Boulder, CO 80301
303-442-3858
Services offered: Financial planning, investment management, retirement plans, tax/accounting services.
Person In Charge: Randy Kryszak
Year Founded: 1988
Web site: www.randykryszak.com

RAY DICKERSON

5398 Manhattan Circle
Boulder, CO 80303
303-499-2049
Person In Charge: Ray Dickerson

RAYMOND JAMES & ASSOCIATES

1942 Broadway, Suite 400
Boulder, CO 80302
303-402-6907/303-402-6908
Services offered: Detailed financial planning and individualized portfolio management.
Person In Charge: Greg Evans, First Vice President of Investments
Year Founded: 1962
Web site: www.millstoneevans.com

RBC DAIN RAUSCHER INC.

1801 13th St., Suite 310
Boulder, CO 80302
303-443-5384/303-443-4483
Services offered: Investment services to individual investors and small businesses, trust and estate planning, investment banking services to corporations and municipalities nationwide.
Person In Charge: Butch Carlson, Branch Manager
Year Founded: 1909
Web site: www.rbcdain.com

ROBERT W. BAIRD & CO.

1881 9th St., Suite 250
Boulder, CO 80302
303-786-7240/303-786-7234
Services offered: Financial planning, asset analysis, wealth management, corporate and executive services.
Person In Charge: David Brazeau, Manager
Year Founded: 1919
Web site: www.rwbaird.com

ROSS GROUP WEST

2299 Pearl St., Suite 211
Boulder, CO 80302
303-440-7434/303-443-6307

SCOTTRADE INC.

2425 Canyon Blvd. Suite N.
Boulder, CO 80302
303-413-0800/303-402-0437
Services offered: Online investing, stocks, bonds, mutual funds, CDs, IRAs, CDs, stock news and research.
Person In Charge: Dean Fredrickson, Branch Manager
Year Founded: 1980
Web site: www.scottrade.com

SMITH BARNEY INC.

1050 Walnut St., Suite 100
Boulder, CO 80302
303-413-1724/303-443-6539
Services offered: Global, full-service investment banking and wealth management.
Person In Charge: Elyssa Baltazar, Manager
Year Founded: 1895
Web site: www.smithbarney.com

STEWART FARNELL

4540 MacArthur Drive
Boulder, CO 80303
303-541-0782/303-545-5668
Services offered: Fee-only financial planning, education and coaching.
Person In Charge: Stewart Farnell, C.F.P.
Year Founded: 1991
Web site: www.stewartfarnell.com

SUMMIT BANK & TRUST INVESTMENT SERVICES

2002 E. Coalton Road
Broomfield, CT 80027
303-460-4700/303-460-4751
Services offered: Full-service company providing bank clients with financial advice and carefully researched investment recommendations.
Person In Charge: Eileen Kim, Lisa McStravick and Susan Killough
Year Founded: 2006
Web site: www.summitbt.com

TARRALL, SKRAM & NIELSON

2590 Trailridge Drive East, Suite 202
Lafayette, CO 80026
303-415-2525/303-415-2524
Services offered: Wealth management: investment management and financial planning.
Person In Charge: Hony Tarrall, President and Marilynne Tarrall
Year Founded: 1994
Web site: www.tarrall.com

THE HCM GROUP

10901 W. 120th Ave., Suite 320
Broomfield, CO 80021
303-926-9600
Services offered: Retirement plan consulting.
Person In Charge: Jonathan W. Postal, Principal
Web site: www.hcm.com

THE WEALTH CONSERVANCY INC.

1525 Spruce St., Suite 300
Boulder, CO 80302
303-444-1919/303-444-1479
Web site: www.thewealthconservancy.com

UBS FINANCIAL SERVICES INC.

1801 13th St., Suite 100
Boulder, CO 80302
303-447-2940/303-441-5370
Services offered: Complete financial services, including managed accounts, alternative investments, retirement plans, mutual funds, CDs, tax-exempt bonds, stocks, government securities.
Person In Charge: George Baker
Year Founded: 1879
Web site: www.ubs.com/branch/boulderby

VARRA FINANCIAL

1400 Main St.
Louisville, CO 80027
303-665-2822
Services offered: Pension and retirement planning, mutual funds, variable annuities, health insurance, long-term care.
Person In Charge: Gina Varra, Owner
Web site: www.financial-advisors.in

VECTRA BANK COLORADO

2696 Broadway
Boulder, CO 80304
720-947-8407/720-947-8410

WACHOVIA SECURITIES LLC

1919 14th St.
Boulder, CO 80302
303-441-0600/303-441-0656
Services offered: Integrated investment banking brokerage and asset management business that develops capital raising, market making and financial advisory services.
Person In Charge: Sandy Moore, Manager
Web site: www.wachovia.com

WADDELL & REED

1200 28th St.
Boulder, CO 80303
303-444-8800/303-449-1018
Services offered: Financial planning, advising, investments, insurance. Security brokers and dealers.

Person In Charge: Richard Harris
Year Founded: 1937
Web site: www.waddell.com
WADDELL & REED INC.
1200 28th St., Suite 200
Boulder, CO 80303-1701
303-444-8800/800-532-2749
Web site: www.waddell.com

WELLS FARGO WEALTH MANAGEMENT GROUP

1801 13th St., Suite 200
Boulder, CO 80302
303-541-2020/303-541-2059
Services offered: Stock and bond brokerage, wealth planning, investment management and trusts, private banking.
Person In Charge: Rick Nelson, Regional Manager
Year Founded: 1852
Web site: www.wellsfargo.com

MORTGAGE LENDERS

ADVANTAGE BANK - BOULDER BRANCH

1611 Canyon Blvd.
Boulder, CO 80302
303-442-0445/303-442-1037
Services offered: Full range of residential real estate mortgages and construction loans. Commercial real estate financing.
Person in charge: William J. Unrein, Boulder Branch President and Justine Bartlett, Residential Real Estate, Mortgage Planner
Web site: www.advantagebanks.com

AM MORTGAGE BROKERS

4845 Pearl East Circle, Suite 101
Boulder, CO 80301
303-440-6446/303-440-6160
Services offered: Conventional, jumbo loans, relocation programs, one-time close construction loans, second homes investment properties.
Person in charge: Pamela D. Amon, President
Web site: www.amloan.vlending.com

AMERICAN HOME MORTGAGE

606 Mountain View Ave., Suite 102
Longmont, CO 80501
303-772-9790/303-772-8011
Services offered: Residential "A" paper and "Alt-A" paper including conventional, FHA and VA programs.
Person in charge: David Brenner, Area Manager
Web site: www.waterfield.com

AMERICAN HOME MORTGAGE

606 Mountain View Ave., Suite 102
Longmont, CO 80501
303-772-9790/303-772-8011
Services offered: Residential "A" paper and "Alt-A" paper, including conventional, FHA and VA programs.
Person in charge: David Brenner, Senior Vice President and Area Manager
Web site: www.waterfield.com

AMERICAN NATIONAL BANK

3033 E. First Ave.

PORTFOLIO - FINANCE & INSURANCE DIRECTORY

Denver, CO 80206
303-443-1411/303-329-9629
Services offered: Financial services
Person in charge: Roger Ayan

AMERICAN WESTERN MORTGAGE CO.
600 S. Airport Road, No. 203
Longmont, CO 80503
303-776-7761/303-776-3255
Person in charge: Kathy Stein, Vice President
Web site: www.awmhome/van.com

ARAPAHOE MORTGAGE CO.
4593 Broadway St.
Boulder, CO 80304
303-232-5605

AUTOMATED LENDING INC.
1637 Pearl St., Suite 203
Boulder, CO 80302
303-544-0600/303-544-0700
Services offered: Residential and commercial lending.
Person in charge: Calvin Cox, President
Web site: www.automatedlending.net

AVERE LENDING GROUP
699 Tamarisk Court
Louisville, CO 80027
303-666-7322/303-666-7312
Person in charge: Teri Vanderhyden, Broker and Owner

BENEFICIAL MORTGAGE CO. OF COLORADO
700 Ken Pratt Blvd.
Longmont, CO 80501
303-772-1374/303-772-4169

BOULDER FUNDING
4450 Arapahoe Ave.
Boulder, CO 80303
303-415-2063/720-528-7840

BOULDER MORTGAGE CO.
4450 Arapahoe Ave., Suite 100
Boulder, CO 80303
303-442-3796/720-294-1266
Services offered: Provides residential mortgages.
Person in charge: Marilyn Sweet and Rita Laitres, Co-owners
Web site: www.boulder-mortgage.com

BOULDER WEST FINANCIAL SERVICES INC.
2569 Park Lane, Suite 202
Lafayette, CO 80026
303-443-9424/303-443-0555
Services offered: Purchase financing residential and commercial, refinancing, construction and permanent financing, bridge loans.
Person in charge: C.J. Galbraith, President
Web site: www.boulderwest.com

BROAD STREET MORTGAGE
1790 38th St.
Boulder, CO 80301
303-444-9100/303-444-1933
Person in charge: Randy Kelly, Branch Manager
Web site: www.broadstreetmortgage.com

BROKERS MORTGAGE SERVICE
1446 Wildrose Drive

Longmont, CO 80503
303-651-6799/303-684-8170
BROOKSTONE MORTGAGE BROKERS
2060 Broadway, Suite 400
Boulder, CO 80302
303-444-7121/303-440-6243
Person in charge: Laurie King
Web site: www.brookstonemtg.com

CAPITAL ADVANTAGE MORTGAGE
1225 Ken Pratt Blvd., Unit 214
Longmont, CO 80501
303-772-5990

GUARANTY BANK & TRUST
401 Main St.
Longmont, CO 80301
303-776-5800/303-776-5800
Services offered: Banking and financial services.
Person in charge: Daniel Quinn
Web site: www.centennialbanks.com

CHASE
1800 Broadway
Boulder, CO 80302
303-245-6660/303-245-6692
Services offered: First mortgage purchase and refinance as well as second mortgages.
Person in charge: James Dimon
Web site: www.chase.com

CHASE MANHATTAN MORTGAGE CORP.
4800 Riverbend Road
Boulder, CO 80301
303-442-3775/303-442-3017

CHERRY CREEK MORTGAGE
4999 Pearl East Circle, Suite 200
Boulder, CO 80301
303-440-3533/303-440-3560
Services offered: FHA, VA, conventional purchase and refinance loans.
Person in charge: Terri Wolf, Branch Manager
Web site: www.cherrycreekmtg.com

CLARION CAPITAL MORTGAGE
582 Matthews Circle
Erie, CO 80516
303-427-3636/303-200-8082
Person in charge: Dan Green
Web site: www.clarionmortgage.com

COBIZ FINANCIAL INC.
821 17th St.
Denver, CO 80202
303-293-2265/303-293-0700
Person in charge: Jon Lorenz

COLONIAL NATIONAL MORTGAGE
2500 30th St.
Boulder, CO 80301
303-443-4427/303-443-4924
Person in charge: Suter DuBose
Web site: www.cnmloan.com

COLORADO COMMERCIAL MORTGAGE
4450 Arapahoe Ave., Suite 100
Boulder, CO 80303
303-913-0591
Person in charge: Holly Poage

COLORADO MORTGAGE ALLIANCE
225 South Boulder Rd.
Louisville, CO 80027

Services offered: Residential lending home mortgage: conventional, jumbo, FHA, VA purchase, refinance, second mortgages

COLORADO WESTERN MORTGAGE CORP.
1919 14th St., Suite 800
Boulder, CO 80302
303-786-7575/303-484-4328
Services offered: Residential and commercial mortgage banking, property management and disposition services.
Person in charge: Robert Emrick, President
Web site: www.denverlending.com

COMMUNITY LENDING
4450 Arapahoe Ave.
Boulder, CO 80303
303-415-2535/303-494-0117

COMPASS BANK - GUNBARREL
6685 Gunpark Drive
Boulder, CO 80301
303-581-0123/303-581-0128
Services offered: Development loans, construction loans, commercial mortgages.
Person in charge: D. Paul Jones, Jr.
Web site: www.compassbank.com

COMPETITIVE MORTGAGE SERVICES CORP.
1300 Plaza Court N., Ste. 200
Lafayette, CO 80026
303-604-2240/303-604-2241
Services offered: Mortgage brokering/banking
Person in charge: Robert Myers
Web site: www.competitivemtg.com

COUNTRYWIDE HOME LOANS
2595 Canyon Blvd., Ste 110
Boulder, CO 80302
303-443-1122/303-443-6739
Services offered: A diversified financial services company with mortgage banking at its core.
Person in charge: Elizabeth Million, Branch Manager
Web site: www.countrywide.com

COUNTRYWIDE HOME LOANS INC.
3561 N. Stagecoach Road
Longmont, CO 80504
Person in charge: Lisa Udis-Beranich, Branch Manager

CROWDER MORTGAGE, LLC
3445 Penrose Place, Suite 240
Boulder, CO 80301
303-444-1545/303-444-3534
Services offered: Any type of real estate financing: residential, commercial, land or construction.
Person in charge: James Jr. Crowder, President
Web site: www.crowder.com

DIVERSIFIED LENDING SERVICES INC.
700 Burbank St.
Broomfield, CO 80020
303-469-7426/303-469-6818

DNL MORTGAGE AUTHORITY INC.
1242 Inverness St.
Broomfield, CO 80020
303-469-5062/303-469-5074

Services offered: Conventional loans, 100% loan-to-value second mortgages, in-home appointments.
Person in charge: Ted Degenhart, President
Web site: www.hsh.com/show/dnl_mortgage.html

DOMINION MORTGAGE INC.
3050 Broadway, Suite 300
Boulder, CO 80304
303-447-3210/303-447-3246

DOVETAIL LENDING LLC
1035 Pearl St., Suite 312
Boulder, CO 80302
303-449-0343/800-928-5042
Services offered: Conventional, jumbo, 100%, energy-efficient mortgages.
Person in charge: Eric S. Peltier, Owner
Web site: www.dovetaillending.com

EAGLE BANK
1990 West 10th Ave.
Broomfield, CO 80020
303-460-9991/303-460-9987

ELEVATIONS CREDIT UNION
2960 Diagonal Highway
Boulder, CO 80301
303-443-4672/720-565-4673
Services offered: Full-service mortgage lending, online application, local service.
Web site: www.elevationscu.com

EQUITABLE SAVINGS & LOAN ASSOCIATION
221 N. Third St.
Sterling, CO 80751
970-522-6522/970-522-3917
Person in charge: Bill Furbee, CEO
Web site: www.equitable-savings.com

EZ MORTGAGE INC
Longmont, CO N/A
888-770-9300/303-755-7100

FIRST CITY FINANCIAL GROUP
2 Garden Center
Broomfield, CO 80020
303-460-0800/303-473-0700

FIRST COMMUNITY INDUSTRIAL BANK
600 Kimbark St.
Longmont, CO 80501
303-776-2727/303-776-1529

FIRST NATIONAL BANK
615 Interlocken Blvd.
Broomfield, CO 80221
720-566-6060/720-566-6061
Person in charge: Gay E. Kuhlmann
Web site: www.gaykuhlmann.com

FIRST NATIONAL BANK - BOULDER MAIN BRANCH
3033 Iris Ave.
Boulder, CO 80301
303-443-9090/303-417-4430
Services offered: Loan programs for purchase, refinance, jumbo, conventional, investment, government, second homes and first time home buyers.
Person in charge: Gene Humphries, President
Web site: www.1stnationalbank.com

FIRSTBANK OF BOULDER - 95TH & SOUTH BOULDER ROAD BRANCH IN KING SOOPERS
1375 South Boulder Road
Louisville, CO 80027
303-237-5000/303-665-6298

FIRSTBANK OF LONGMONT - ERIE BRANCH
512 Briggs St.
Erie, CO 80516
303-828-3393/303-828-4101
Web site: www.efirstbank.com

FIRSTBANK OF LONGMONT - TWIN PEAKS BRANCH
1270 S. Hover St.
Longmont, CO 80501
303-678-7000/303-684-6959
Web site: www.efirstbank.com

FIRSTBANK OF LONGMONT
1707 N. Main St.
Longmont, CO 80501
303-772-5500/303-678-4157
Person in charge: Bruce Robbins
Web site: www.efirstbank.com

FLATIRONS BANK
5400 Mount Meeker Road
Boulder, CO 80301
303-530-4999/303-530-4735
Person in charge: Bret Duston
Web site: www.flatironsbank.com

FLATIRONS FINANCIAL
420 21st Ave., Suite 109
Longmont, CO 80501
303-682-2294/303-776-0459

FORT WORTH MORTGAGE CORP.
2805 Wilderness Place
Boulder, CO 80301
303-443-4427/303-443-4924

GMAC MORTGAGE
3100 Arapahoe Ave., Suite 302
Boulder, CO 80303
303-530-6997/303-530-1375
Services offered: And first and second residential product, conventional, jumbo, government.
Person in charge: Nancy Delacroix
Web site: www.gmac.net/nancy.delacroix

GREENCO FINANCIAL INC.
3005 Center Green Drive, Suite 200
Boulder, CO 80301
303-444-8900/303-444-8979
Services offered: FHA, VA, underwrite and fund in-house, first mortgages of all types, adjustable, jumbo, fixed and CHFA.
Person in charge: Mike Greenberg, President
Web site: www.greencofinancial.com

GUARANTY BANK & TRUST CO.
900 S. Main St.
Longmont, CO 80501
303-296-9600/303-702-0451
Person in charge: David Boyles

HIGHLAND MORTGAGE SERVICES
885 Arapahoe Ave.
Boulder, CO 80302
303-245-9230/303-447-1392

PORTFOLIO - FINANCE & INSURANCE DIRECTORY

HOME KEY LENDING LLC

1501 S. Seibert Court
Superior, CO 80027
720-214-3238/720-214-3240

Services offered: Construction, residential, commercial and subprime and foreclosure and investment

Person in charge: Jim Dorney, Owner
Web site: www.homekeylending.com

MILE HIGH BANKS

1726 Hover St.
Longmont, CO 80501
303-684-7350/303-684-8778
Person in charge: Daniel Allen
Web site: www.bankhorizononline.com

INSPIRED LENDING

1000 S. McCaslin Blvd., Suite 300S
Superior, CO 80027
303-281-0800/303-664-5557
Services offered: Mortgage services.
Person in charge: John Christoff, President
Web site: www.inspiredlending.com

J. ALLSTON MORTGAGE LLC

885 Arapahoe Ave.
Boulder, CO 80302
720-406-0543
Services offered: Conventional forward mortgages, reverse mortgages, FHA, life insurance, retirement planning and college savings plans.
Person in charge: Jim Bonner and

Kate Gardner, Principals
Web site: www.jallston.com

J. STEVENS MORTGAGE

2299 Pearl St., Suite 304
Boulder, CO 80304
303-444-1115

LIBERTY SAVINGS BANK

1697 E. Coalton Road, Suite A
Superior, CO 80027
303-494-9200

Services offered: Small business loans, commercial loans, cash management, business online banking, free business checking.

LIBERTY SAVINGS BANK

351 Coffman St.
Longmont, CO 80501
303-776-3333/303-776-5333
Web site: www.libertysavingsbank.com

LOANSTARS

2990 Wilderness Place, Suite 100
Boulder, CO 80301
303-449-4007

MORTGAGE AMERICA INC.

1525 Spruce St., Suite 201
Boulder, CO 80302
303-440-6900/303-443-3949
Services offered: Purchase, construction and refinance mortgage services. Reverse mortgages.

Person in charge: Martin Wirth, President
Web site: www.mortgageamericainc.com

MORTGAGE DEVELOPMENT COS.

700 Ken Pratt Blvd., No. 510
Longmont, CO 80501
800-280-0230/303-651-9699
Web site: www.mortgagedev.com

MORTGAGE DIRECT INC.

4410 Arapahoe Ave., Suite 105
Boulder, CO 80303
303-499-2083/303-499-1352
Person in charge: Bernita Curley, President
Web site: www.mtgdirectco.com

MORTGAGEMAX INC.

3005 Center Green Drive, Suite 225
Boulder, CO 80301
303-443-5566/303-444-8610
Services offered: Full-service FHA, VA and conventional residential financing in-state, nationwide lending, commercial, foreclosures, construction, lots, developers, spec. homes, investment property.
Person in charge: James Dorney, President
Web site: www.mortgagemaxloans.com

MOUNTAIN PACIFIC MORTGAGE CO.

4880 Riverbend Road
Boulder, CO 80301
303-442-1003/303-442-1303
Services offered: Residential, com-

mercial & construction loans
Web site: www.mountainpacificmortgage.com

NORTH SUBURBAN MORTGAGE CO.

11480 N. Sheridan Blvd., Suite 200
Westminster, CO 80020-3347
303-465-4155/303-465-4153
Services offered: First and second mortgages, purchase or refinancing, conforming, jumbo, FHA and VA.
Person in charge: Michelle Lewis and Darrell Lewis, President
Web site: www.nsmortgage.com

NORTH VALLEY BANK

1210 E. First Ave.
Broomfield, CO 80020
Web site: www.nvbank.com

NORWEST FINANCIAL

1250 S. Hover Road
Longmont, CO 80501
303-772-8000/303-772-2586

ORION MORTGAGE INC.

10560 Wadsworth Blvd.
Broomfield, CO 80021
303-469-1254/303-469-6744
Services offered: Mortgage loans for any purpose.
Person in charge: Don Opeka, President
Web site: www.orionmortgageinc.com

PREFERRED MORTGAGE SERVICES INC.

954 McIntosh Ave.
Broomfield, CO 80020
720-872-1170/303-280-2023

PREMIER MORTGAGE GROUP

1844 Folsom St.
Boulder, CO 80302
303-449-8855/303-449-4455
Services offered: Complete mortgage banking services, construction loans, FHA and VA, jumbo loans.
Person in charge: Melanie Nygren, Production Manager
Web site: www.pmgllending.com

PREMIER MORTGAGE GROUP LLC

600 S. Airport Road, Building B, Suite J
Longmont, CO 80503
303-684-8855/303-684-8899
Person in charge: Edmond Johnson/Philip Robertson, Partners/Owners
Web site: www.premiermort.com

PULTE MORTGAGE

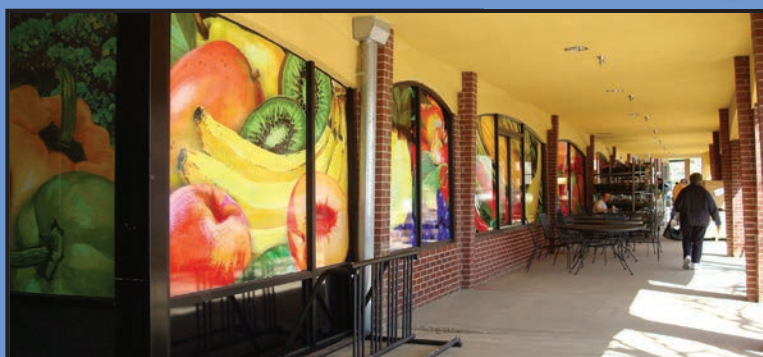
4450 Arapahoe Ave., Suite 100
Boulder, CO 80303
303-415-2055/303-485-0666
Services offered: Originate FHA, VA and conventional loans, bridge loans, HELOC, second mortgages.
Person in charge: Kerrin Mahr Reichen

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E-mail: arrowoff@aol.com • www.arrowoffice.com

PORTFOLIO - FINANCE & INSURANCE DIRECTORY

RESCOM MORTGAGE CO.

2969 Baseline Road
Boulder, CO 80303
303-444-4500/303-449-1289

Services offered: Commercial and residential financing.

Person in charge: Bryan Beckett and Dave Olsen

Web site: www.rescomonline.com

RESOURCE MORTGAGE

1221 Pearl St.
Boulder, CO 80302
303-444-1200/303-444-6817

ROCKY MOUNTAIN LOAN SERVICES

4585 W. Elizabeth Lane
Broomfield, CO 80020
303-638-6383/303-410-8038

Services offered: Dedicated to providing low cost solutions for borrowing needs. Offers no closing costs on all loan products and services.

Person in charge: Joy Liu

Web site: www.rmlsmortgage.com

ROCKY MOUNTAIN MORTGAGE BROKERS

410 Main St.
Longmont, CO 80501
303-678-7809/303-776-9801

Services offered: Loan consulting, refinance owner occupied and investment, purchase loans residential

Person in charge: Debby Paris

U.S. BANK - BOULDER MAIN OFFICE

1650 28th St., Suite 1244
Boulder, CO 80301
303-444-7017/303-444-2849

Services offered: Full-service mortgage banking.

Person in charge: Cheryl Butler, Senior Loan Officer

Web site: www.usbank.com

UNITED CAPITAL MORTGAGE

2595 Canyon Blvd. Suite 160
Boulder, CO 80302
303-449-6111/303-442-2661

Services offered: Full-service mortgage banker, including table funding, delegated underwriting & competent originators

Person in charge: Al Legaya, Loan Officer

Web site: www.ucmc.net

UNITED LENDING INC.

885 Arapahoe
Boulder, CO 80302
303-494-5170/303-494-1460

Services offered: Mortgages (conventional, jumbo, construction, purchases, refinances, no income, no asset), bridge loans, interest only.

Person in charge: Nahid Cohen, CEO

Web site: www.unitedlendingonline.com

US BANK

6363 W. 120th Ave.
Broomfield, CO 80020
303-460-4668/303-465-5871

US BANK

3338 Arapahoe Road
Erie, CO 80516
303-269-8300/303-926-0318

US BANK

2845 Linden Court
Loveland, CO 80538
970-669-5172/970-669-0553

Services offered: Banking.

Web site: www.usbank.com

US BANK

910 West Cherry Ave.
Louisville, CO 80027
303-604-9872/303-604-9346

US BANK

1495 Canyon Blvd.
Boulder, CO 80302
303-449-8172/303-444-1496

US BANK

995 S. Hover
Longmont, CO 80501
303-485-9316/303-485-9321

Person in charge: Tyson Bullard

Web site: www.usbank.com

US BANK

1150 State Highway 287
Broomfield, CO 80020
303-410-8194/303-410-2603

US BANK

605 Flatiron Marketplace Drive
Broomfield, CO 80020
720-566-7700/720-566-0991

VALLEY BANK & TRUST - LOUISVILLE

511 E. South Boulder Road
Louisville, CO 80027
303-666-0906/303-666-0989

Person in charge: Bruce Clark, Director of Marketing

Web site: www.valleybankandtrust.com

VALLEY BANK AND TRUST - LYONS

304 2nd Ave.
Lyons, CO 80540
303-823-6668/303-449-1930

Person in charge: Bruce Clark, Director of Marketing

Web site: www.valleybankandtrust.com

VECTRA BANK - BOULDER PEARL

1700 Pearl St.
Boulder, CO 80302
720-947-8450/720-947-8427

Services offered: First and second mortgage loans.

Person in charge: Gay E. Kuhlmann

Web site: www.vectrabank.com

VECTRA BANK COLORADO

1700 Pearl St.
Boulder, CO 80302-5517
720-947-8433/720-947-8460

Person in charge: Alan Swanson, Mar-

ket President for Boulder & Longmont
Web site: www.vectrabank.com

VECTRA BANK COLORADO

1990 W. 10th Ave.
Broomfield, CO 80020-1071
303-447-5960

WASHINGTON MUTUAL BANK, FA

1610 Pace St., Suite 400
Stockton, CA 80501
303-702-9067/303-702-9873

Web site: www.wamu.com

WASHINGTON MUTUAL HOME LOAN CENTER

3223 Arapahoe, No. 102
Boulder, CO 80303
303-449-5703/303-449-5717

Services offered: Conventional first-mortgage loans.

Person in charge: Linda Eis, Vice President

Web site: www.wamuhomeloans.com

WELLS FARGO - BOULDER

1242 Pearl St.
Boulder, CO 80302
303-441-0355/303-441-0392

Services offered: Complete financial services.

Person in charge: Richard M. Kovacevich

Web site: www.wellsfargo.com

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635 Coffman St.
Longmont, CO 80501
303-776-7240/303-772-3202
Services offered: Mortgage and refinance services.
Person in charge: Ron Dick, Branch Manager and Thomas Honig, Regional President
Web site: www.wellsfargo.com

WR STARKEY MORTGAGE

1470 Walnut St., Ste. 100
Boulder, CO 80302
303-545-9600/303-545-2950
Web site: www.cnash.com

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12250 E. Iliff Ave.
Aurora, CO 80014
800-736-2238
Web site: www.sbs.adp.com

ASPEN PERSONNEL SERVICES

1155 S. Main St.
Longmont, CO 80501
303-776-9661/303-776-0195
Person in Charge: Carey Kempf, CEO
Year Founded: 1995
Web site: www.aspenstaffing.com

BOLDER MINDS INC.

1526 Spruce St., Suite 200
Boulder, CO 80302
303-447-2610/866-268-5330
Person in Charge: Susan McNiff, Founder
Year Founded: 2005
Web site: www.bolderminds.com

BOLDER STAFFING INC.

555 U.S. Highway 287
Broomfield, CO 80020
303-465-5548/303-465-5517
Person in Charge: Jackie Osborn, President
Year Founded: 1992
Web site: www.bolderstaffing.com

COET & COET PC

10875 Dover St., Suite 400
Westminster, CO 80021
303-426-6444/303-426-0712
Person in Charge: Frances J. Coet and John R. Coet, Co-owners
Web site: www.coetandcoet.com

DIXON FINANCIAL OFFICES

936 Kimbark St., Suite 4
Longmont, CO 80501
303-651-1641
Person in Charge: Carol Dixon, Owner
Year Founded: 1985

E. PAUL LEV-ARY & ASSOCIATES

2291 Arapahoe Ave.
Boulder, CO 80302
303-440-4275/303-443-6663
Person in Charge: Paul Lev-Ary, Owner
Year Founded: 1982
Web site: www.lev-ary.com

HENRY, WATERS & ASSOCIATES INC.

4740 Table Mesa Drive
Boulder, CO 80305
303-494-4050/303-494-6352
Person in Charge: Steven T. Henry and John Waters, Co-owners
Year Founded: 1978
Web site: www.HenryWaters.com

JAMES D. PIEPER, C.P.A.

255 Weaver Park Road, Suite 201
Longmont, CO 80501
303-651-0771
Person in Charge: James D. Pieper, Owner

PAYCHEX INC.

4400 Kittredge St., Suite 50
Denver, CO 80239
303-307-0505/303-307-8647
Person in Charge: Jonathan Judge
Title: CEO and President
Year Founded: 1971
Web site: www.paychex.com

PAYCHOICE

185 N. College Ave.

Fort Collins, CO 80542
970-416-0711/970-484-0095
Person in Charge: Carol Peddicord, Operations Manager
Year Founded: 1995
Web site: www.paychoice.com

PAYMASTER BUSINESS SYSTEMS

3319 N. 95th St.
Lafayette, CO 80026
303-604-6382

PAYROLL 1

1660 S. Albion St., Suite 800
Denver, CO 80222
303-782-0999
Person in Charge: Elaine Kelly, CEO and President
Year Founded: 1986
Web site: www.payroll1.com

SILVERLINE PAYROLL INC.

4730 Walnut St., Suite 106
Boulder, CO 80301
303-444-4948/303-444-5068
Person in Charge: Matt Given, Founder and President
Web site: www.silverlinepayroll.com

SOFTSOLUTIONS LLC

P.O. Box 1154
Frederick, CO 80530
303-833-0444
Web site: www.softsolutions.biz

SBA LENDERS

AMERICAN NATIONAL BANK

1360 Walnut St.
Boulder, CO 80302
303-394-5100
Person in Charge: Dennis Nathan
Web site: www.anbank.com

ARIZONA BUSINESS BANK

2700 N. Central Ave., Suite 200
Phoenix, AZ 85004
602-240-2704/602-240-2701
Person in Charge: Kevin Quinn, CEO and President
Web site: www.azbizbank.com

ARIZONA BUSINESS BANK

2700 N. Central Ave., No. 210
Northglenn, CO 80234
303-451-1010/303-450-5046
Person in Charge: Timothy Wiens, CEO and President
Web site: www.firsttierbank.com

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Person In Charge: Darrell McAllister
Web site: www.bankofchoiceonline.com

BANK OF COLORADO

1609 E. Harmony Road
Ft. Collins, CO 80525
970-206-1160

Person In Charge: Shawn Osthoff, Vice president
Web site: www.bankofcolorado.com

BANK OF THE WEST

10181 Truckee Tahoe Airport Road
Truckee, CA 96161
530-582-3050

Person In Charge: Don J. McGrath, CEO
Web site: www.bankofthewest.com

BANK ONE NATIONAL ASSOCIATION

1125 17th St.
Denver, CO 80202
303-241-3271/303-296-8176

Person In Charge: James Dimon, Chairman and CEO
Web site: www.bankone.com

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121 W. Dewey St., Suite 210
Wichita, KS 67202
316-263-3232/316-263-4391

CALIFORNIA BANK & TRUST

2399 Gateway Oaks Drive, Suite 110
Sacramento, CA 95833
800-355-0507

Person In Charge: David Blackford, CEO and President
Web site: www.calbanktrust.com

CALIFORNIA BANK AND TRUST

11622 El Camino Real, Suite 200
San Diego, CA 92130
858-793-7400

Person In Charge: David Blackford, President
Web site: www.calbanktrust.com

CAPITAL ONE FEDERAL SAVINGS BANK

1680 Capital One Drive
McLean, VA 22102
800-801-1164

Person In Charge: Richard Fairbank, Chairman, President and CEO
Web site: www.capitalone.com

CEDCO SMALL BUSINESS FINANCE CORP.

1175 Osage St., Suite 110
Denver, CO 80204
303-893-8989/303-892-8398

Person In Charge: William Bacon, Executive director
Web site: www.cedco.org

GUARANTY BANK & TRUST

4650 Royal Vista Circle
Fort Collins, CO 80528
970-454-4220

Person In Charge: Daniel Quinn, President
Web site: www.centennialbanks.com

CENTER BANK

253 N. Western Ave.
Los Angeles, CA 90004
213-381-2222

Person In Charge: Jae Yoo Whan, President
Web site: www.centerbank.com

CENTER BANK

3435 Wilshire Blvd., Suite 700
Los Angeles, CA 90010
213-251-2222

Person In Charge: Seon Hong Kim
Web site: www.centerbank.com

CIT SMALL BUSINESS LENDING CORP.

1526 Cole Blvd., Building 3
Golden, CO 80401
303-202-3756

Person In Charge: Albert R. Gamper, Chairman, President and CEO
Web site: www.smallbiz.com

CIT SMALL BUSINESS LENDING CORP.

1 CIT Drive
Livingston, NJ 07039
800-713-4984

Person In Charge: Chris Reilly, President
Web site: www.smallbizlending.com



COLORADO LENDING SOURCE

518 17th St., Unit 1800
Denver, CO 80202
303-657-0010/303-657-0140

Person In Charge: Mike O'Donnell, Executive director
Web site: www.coloradolending-source.org

COMERICA BANK

55 River St., Dept. 215
Santa Cruz, CA 95060
408-439-1700

Person In Charge: Kristen Ditlevsen, SBA Lender
Web site: www.comerica.com

COMERICA BANK

500 Woodward Ave.
Detroit, MI 48226
800-292-1300

Person In Charge: Ralph W. Babb, Jr., CEO
Web site: www.comerica.com:80/

COMMUNITY FIRST NATIONAL BANK

520 Main Ave.
Fargo, ND 58214
800-575-6677

Person In Charge: Mark A. Anderson, CEO, President
Web site: www.communityfirst.com

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1331 17th St., Suite 810
Denver, CO 80202
303-292-9280/303-292-9285

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Northglenn, CO 80234

303-451-1010

Person In Charge: D. Paul Jones, Chairman and CEO
Web site: www.compassweb.com

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15 S. 20th St.
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205-297-3000/303-280-5155

Person In Charge: D. Paul Jones, Jr
Web site: www.compassweb.com

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2400 Trade Centre Avenue
Longmont, CO 80503
303-678-8876

Person In Charge: Joe Carey, President
Web site: www.fidelity-comtech.com

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7900 Jefferson N.E.
Albuquerque, NM 87109
505-241-7610/505-241-7606

Person In Charge: Michael Stanford, President
Web site: www.fcbcolo.com

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205 W. Oak St.
Ft. Collins, CO 80521
970-282-9680/970-229-9104

Person In Charge: Mark Driscoll, President and Chris Osborn, CEO Colorado Holding Co.
Web site: www.1stnationalbank.com

FIRST NATIONAL BANK OF ARIZONA

17600 N. Perimeter Drive
Scottsdale, AZ 85255
480-458-2000/480-458-2090

Person In Charge: Ray Lamb, CEO
Web site: www.fnbaonlinehb.com

FIRST NATIONAL BANK OF ARVADA

7530 Grandview Ave.
Arvada, CO 80002
303-422-1441

Web site: www.fnboa.com

FIRST NATIONAL BANK OF COLORADO INVESTMENT MANAGEMENT & TRUST

1155 Canyon Blvd., Suite 210
Boulder, CO 80302
303-938-5601/303-417-4116

Person In Charge: Alden Sherman
Web site: www.fnbonline.com

FIRST STATE BANK NM DBA FIRST COMMUNITY BANK IN COLORADO

120 West Plaza
Taos, NM 87571
505-758-6600

Person In Charge: Michael Stanford
Web site: www.fsbnm.com

FIRSTBANK OF BOULDER

6500 Lookout Road
Boulder, CO 80301
303-530-1000

Person In Charge: Doug Kenkel, President
Web site: www.efirstbank.com

FIRSTBANK OF LITTLETON

101 W. County Line Road

Littleton, CO 80129

303-798-3000

Person In Charge: Andy Hancock, President
Web site: www.efirstbank.com

FIRSTBANK OF LONGMONT - TWIN PEAKS BRANCH

1270 S. Hover St.
Longmont, CO 80501
303-678-7000/303-684-6959

Web site: www.efirstbank.com

FIRSTBANK OF LONGMONT

1707 N. Main St.
Longmont, CO 80501
303-772-5500/303-678-4157

Person In Charge: Bruce Robbins
Web site: www.efirstbank.com

FLAGSHIP BANK MINNESOTA

445 E. Lake St.
Wayzata, MN 55391
952-473-1959/952-473-1969

Person In Charge: Roy Terwilliger, CEO and President
Web site: www.flagshipbanks.com:80

FLATIRONS BANK

5400 Mount Meeker Road
Boulder, CO 80301
303-530-4999/303-530-4735

Person In Charge: Bret Duston
Web site: www.flatironsbank.com

FORT COLLINS COMMERCE BANK

3700 S. College St., Suite 102
Fort Collins, CO 80525
970-204-1010/970-204-1590

Person In Charge: Gerard Nalezny, President
Web site: www.fortcollinscommercebank.com

GUARANTY BANK & TRUST CO.

1331 17th St.
Denver, CO 80202
303-296-9600

Person In Charge: Daniel Quinn
Web site: www.guarantybankonline.com

HANMI BANK

3530 Wilshire Blvd., Penthouse
Los Angeles, CA 90010
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Person In Charge: Sung Won Sohn, CEO and President
Web site: www.hanmi.com

HOME STATE BANK

935 N. Cleveland Ave.
Loveland, CO 80537
970-669-4040

Person In Charge: Don Churchwell, CEO
Web site: www.homestatebank.com

MILE HIGH BANKS

1726 Hover St.
Longmont, CO 80501
303-684-7350/303-684-8778

Person In Charge: Daniel Allen
Web site: www.bankhorizononline.com

IRWIN FRANCHISE CAPITAL CORP.

2700 Westchester Ave., Suite 100
Purchase, NY 10577
914-251-1776/914-251-1984

Person In Charge: John Rinaldi, President

Web site: www.irwinfc.com

JP MORGAN CHASE BANK NA

1111 Polaris Parkway
Columbus, OH 43240
312-732-4000

Person In Charge: James Dimon, CEO and President
Web site: www.jpmorganchase.com

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270 Park Ave.
New York City, NY 10017
212-483-2323/312-732-3366

Person In Charge: James Dimon
Web site: www.chase.com

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127 Public Square
Cleveland, OH 44114
800-539-2968

Person In Charge: Timothy King, President
Web site: www.keybankusa.com

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127 Public Square
Cleveland, OH 44114
216-689-3000/216-689-7827

Person In Charge: Henry Meyer
Web site: www.key.com

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1697 E. Coalton Road, Suite A
Superior, CO 80027
303-494-9200

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Aurora, CO 80014
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Person In Charge: Kwang Park Soon, CEO and President
Web site: www.miraebank.com

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3255 Wilshire Blvd.
Los Angeles, CA 90010
213-427-7900

Person In Charge: Kwang Park Soon
Web site: www.miraebank.com

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3701 Wilshire Blvd., Suite 220
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213-351-1327

Person In Charge: Min Kim, COO
Web site: www.narabank.com

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Person In Charge: Karl Chang, SBA Lender
Web site: www.narabankna.com

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Person In Charge: Butch Sharp, SBA Lender

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Colorado Springs, CO 80903
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Person In Charge: Douglas F. Adams, Executive Director and Executive director
Web site: www.pprdc.com

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Denver, CO 80203
303-861-4100
Person In Charge: Stephanie Gerringer, Executive director
Web site: www.preferredlendingpartners.org

PREMIER BANK

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Denver, CO 80202
303-623-8888
Person In Charge: George Taylor, President
Web site: www.premierbankusa.com

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Temecula, CA 92590
760-749-5570
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Web site: www.temvalbank.com

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Cincinnati, OH 45202
513-632-4141
Person In Charge: Jerry A. Grundhofer
Web site: www.usbank.com

U.S. BANK NATIONAL ASSOCIATION

800 Nicollet Mall
Minneapolis, MN 55402
612-659-2000
Person In Charge: Jim Kubovec, President
Web site: www.usbank.com

UNITED LENDING INC.

885 Arapahoe
Boulder, CO 80302
303-494-5170/303-494-1460
Person In Charge: Nahid Cohen, CEO
Web site: www.unitedlendingonline.com

UNITI BANK

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Buena Park, CA 90621
714-736-5700/714-736-5708
Person In Charge: William Bongkee, CEO and President
Web site: www.unitibank.com

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280 Trumbull St.
Hartford, CT 06103
860-727-7000
Person In Charge: Robert Bernabucci, President
Web site: http:capital.ups.com

VECTRA BANK COLORADO NATIONAL

2000 S. Colorado Blvd., No. 2-1200
Denver, CO 80222
720-947-7700/720-947-7760
Person In Charge: Bruce Alexander, CEO
Web site: www.vectrabankcolorado.com

WACHOVIA SBA LENDING INC.

1620 E. Roseville Parkway, Suite 1
Roseville, CA 95661
800-566-3862
Person In Charge: G. K. Thompson, CEO, Chairman, President
Web site: www.wachovia.com

WELLS FARGO BANK N.A.

121 Park Center Plaza
San Jose, CA 95113
408-975-9781

Person In Charge: John G. Stumpf, COO and President
Web site: www.wellsfargo.com

WELLS FARGO BANK NATIONAL ASSOCIATION

101 N. Phillips Ave.
Sioux Falls, SD 57104
1-800-956-4442
Person In Charge: Dick Kovacevich, Chairman and CEO
Web site: www.wellsfargo.com

WILSHIRE STATE BANK

3200 Wilshire Blvd., 14th Floor
Los Angeles, CA 90010
213-387-3200/213-427-6562
Person In Charge: Soo Min Bong, CEO and President
Web site: www.wilshirebank.com

WORLD TRADE FINANCE INC.

875 N. Virgil Ave.
Los Angeles, CA 90029
323-660-1277/323-660-1470
Person In Charge: Irene Kuo, Accounts manager
Web site: www.wtfinc.com

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8787 Turnpike Drive, Suite 260

Westminster, CO 80030
303-426-8899/303-426-8828
Person In Charge: Frank Mendicino II, Jay Campion and Frank Mendicino III, Managing Directors
Web site: www.accessventurepartners.com

APPIAN VENTURES

1512 Larimer St., Suite 200
Denver, CO 80202
303-830-2450/303-830-2449
Person In Charge: Chris Onan, Principal
Web site: www.appianvc.com

AWEIDA VENTURE PARTNERS

500 Discovery Parkway., Suite 300
Superior, CO 80027
303-664-9520/303-664-9530
Person In Charge: Dan Aweida; Jesse Aweida and Harry Ross, Managing Partners
Web site: www.aweida.com

BOULDER VENTURES LTD.

1900 9th St., Suite 200
Boulder, CO 80302
303-444-6950/303-444-0267
Person In Charge: Kyle Lefkoff, General Partner
Web site: www.boulderventures.com

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Boulder, CO 80302
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Person In Charge: Marc Silverman,
Founder and Managing Partner
Web site: www.cocapgroup.com

COLORADO VENTURE MANAGEMENT INC.

4845 Pearl East Circle, Suite 300
Boulder, CO 80301
303-440-4055/303-440-4636
Person In Charge: Ed Wetherbee,
Partner

CONSCIOUS CAPITAL FUND LP

1705 14th St., Suite 530
Boulder, CO 80302
303-443-8894
Person In Charge: Michael Jude Lopitz
Web site: www.consciouscapitalfund.com

CVM EQUITY FUNDS

2575 Park Lane, Suite 200
Lafayette, CO 80026
303-440-4055/303-440-4636
Year Founded: 1979

DH CAPITAL LLC

2819 Third St.
Boulder, CO 80304
212-774-3729/212-774-3721

ENHANCED CAPITAL PARTNERS LLC

5251 DTC Parkway, Suite 1100
Greenwood Village, CO 80111
303-810-3434/303-524-1278
Web site: www.enhancedcap.com
Person In Charge: David T. Orlandella,
Managing Director
Year Founded: 2002

FOUNDRY GROUP

1050 Walnut St., Suite 210
Boulder, CO 80302
303-642-4050/303-642-4001
Web site: www.foundrygroup.com
Person In Charge: Brad Feld, Managing
Director
Year Founded: 2007

GOES TECHNOLOGY GROUP

6260 Lookout Road
Boulder, CO 80301
303-531-3100/303-531-3200
Web site: www.goes.com
Person In Charge: Vance Diggins,
President
Year Founded: 1978

GREENMONT CAPITAL PARTNERS

1700 Lincoln St., Suite 2000
Denver, CO 80203
303-318-6510/801-749-9873
Web site: www.greenmontcapital.com
Person In Charge: David JK Link,
President
Year Founded: 2004

HIGH COUNTRY VENTURE LLC

831 Pearl St.
Boulder, CO 80302
Person In Charge: Mark Lupa and
Chris Marks, Principals
Web site: www.coloradofund1.com

JPS INTERNATIONAL LLC

1725 Walnut St., Suite A
Boulder, CO 80302-5520
303-998-1679/303-998-1694
Person In Charge: Jared P. Schutz,
President
Web site: www.jpsinternational.com

LACUNA LLC

1100 Spruce St., Suite 202
Boulder, CO 80302
303-447-1700/303-447-1710
Web site: www.lacuna.com

MOBIUS VENTURE CAPITAL

1050 Walnut St., Suite 210
Boulder, CO 80302
303-642-4044/303-642-4001
Person In Charge: Brad Feld, Manag-
ing Director
Web site: www.mobiusvc.com

MORGENTHALER VENTURES

4430 Arapahoe Ave., Suite 220
Boulder, CO 80303
303-417-1601/303-417-1602
Person In Charge: Ralph E. Christof-

fersen, General Partner
Web site: www.morgenthaler.com

NEWWEST CAPITAL PARTNERS

1025 5th St.
Boulder, CO 80302
303-247-1221/303-832-6154
Person In Charge: David Henry, Man-
aging General Partners; Dan Arenberg
and Chet Winter
Web site: www.mezzacap.com

ROSER VENTURES LLC

1105 Spruce St.
Boulder, CO 80302
303-443-6436/303-443-1885
Person In Charge: Christopher W.
Roser, Partner
Web site: www.roserventures.com

SEQUEL VENTURE PARTNERS

4430 Arapahoe Ave., Suite 220
Boulder, CO 80303
303-546-0400/303-546-9728
Person In Charge: John Greff, Partner
Web site: www.sequelvc.com

SOLORADO LLC

4945 Eldorado Springs Drive
Boulder, CO 80303
303-875-9045
Person In Charge: Darrell Laham,
General manager
Web site: www.solorado.com

TANGO

831 Pearl St.
Boulder, CO 80302
303-381-2606/303-381-2630
Person In Charge: Scott Beck
Web site: www.tangogroup.com

VENTURE ASSOCIATES LTD.

4950 E. Evans Ave., Suite 105
Denver, CO 80222
303-758-8710/303-758-8747
Person In Charge: James Arkebauer,
Partner
Web site: www.venturea.com

VISTA VENTURES

1011 Walnut St., 4th Floor
Boulder, CO 80302
303-543-5716/303-543-5717
Person In Charge: Catharine Merigold,
General Partner; Kirk Holland, General
Partner; Molly Nasky, Vice President,
Finance; Dave Dwyer, General Partner
and Lisa Reeves, General Partner
Web site: www.vistavc.com

WOLF VENTURES

1625 Broadway, Suite 930
Denver, CO 80202
303-321-4800/303-321-4848
Person In Charge: David O. Wolf,
Managing Partner
Web site: www.wolfventures.com

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Emergency Services — Any person or organization who has gone above and beyond the call of duty in a life-saving endeavor.

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