

MEDIA CONTACT

Erin Moyer
206.464.5259
E.Moyer@LNWM.com

NEWS RELEASE

December 5, 2014

Laird Norton Wealth Management's Barbara Potter Celebrated as a Financial Times Top 100 Women Financial Adviser

Potter one of only two named from Washington State.

SEATTLE – December 5, 2014 – Laird Norton Wealth Management (LNWM), one of the largest and most experienced wealth management firms in the Pacific Northwest, is pleased to announce that Barbara Potter, LNWM's Managing Director of Fiduciary Services, was selected by the *Financial Times* (FT) for their inaugural list of the best female financial advisers in the United States. According to FT, their intention of publishing this list was to “*provide a snapshot of the best [women advisors] across the US*” for discerning readers. Potter represented Washington State as one of only two women selected for this prestigious group, and only 25 states and Washington DC had advisers make the list.

In reflecting on the news, Barbara Potter commented, “*I'm honored to be recognized by the Financial Times as one of the 2014 FT Top Women Advisers. I love my career as a financial adviser and enjoy helping clients with financial planning, investment management, and trust and estate services. I've been touched by how many long-term clients were genuinely excited to see my name listed among this impressive group of women.*”

This inaugural list showcases an elite tier of advisers with backgrounds, credentials and asset management levels that far exceed the norm. According to Fidelity, the average financial adviser manages \$62 million. The average assets under management by advisers on this list was \$1.8 billion. Their tenure in the industry was an average of 24 years, and their average growth in assets was 18 percent.

According to FT, size is a key indicator, as bad advisors rarely attract and retain clients, but size wasn't the determining factor on who made the list. The selection criteria included everything

from growth rate to credentials to longevity in the industry. Even having an online presence gave candidates a slight edge over other nominees as this was an indication of transparency and should be the industry norm.

Of the Top 100 Women Advisers, only some offered services outside of investment management. Financial Planning was offered most (56 percent), but only 27 percent advised retirees and only 25 percent provided trust and estate services. The Laird Norton Wealth Management model of comprehensive planning, investment and trust and estate services continues to be a unique model of service, even among the elite advisers in the nation.

“I’m delighted to have Barbara honored by such a respected institution in our industry,” said Robert Moser, CEO of Laird Norton Wealth Management. *“She deserves this honor not only for her experience and expertise in planning, investments and trusts administration, but also for the incredible service she provides clients as she helps them manage their financial lives.”*

Potter is a CERTIFIED FINANCIAL PLANNER™, a certified Trust and Financial Advisor, and a graduate of the Pacific Coast Banking School. She has a B.A. in Finance from Seattle City University and is actively involved with Family Law CASA, where she serves on the board of directors.

#

About Laird Norton Wealth Management:

With nearly \$5 billion in assets under advisement, Laird Norton Wealth Management is the Northwest’s premier wealth management company. Originally founded to serve the financial management needs of the Laird and Norton, the firm now provides personalized wealth management solutions for more than 425 individuals, families, private foundations and nonprofit organizations. For nearly half a century, Laird Norton Wealth Management has been driven by a passionate commitment to help its clients and their families achieve security, find happiness and thrive in every aspect of their lives. The company is relentless in the pursuit of client satisfaction and is committed to never fail at putting a client’s best interest as the number one priority.