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WEALTH MANAGEMENT

BARBARA POTTER CELEBRATED AS A *FINANCIAL TIMES* TOP 100 WOMEN FINANCIAL ADVISER

On November 19, the *Financial Times* (FT) named their inaugural list of the best female financial advisers in the United States. Barbara Potter, Laird Norton Wealth Management's Managing Director of Fiduciary Services, represented Washington State as one of two women selected for this prestigious group. Only 25 states and Washington DC had advisers make the list. 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.

IN A LEAGUE OF THEIR OWN

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.

CRITERIA FOR SELECTION

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.

SERVICES OFFERED

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 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."*
>
> *– Barbara Potter*

ABOUT BARBARA

Barbara 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.