lairdnorton
WEALTH MANAGEMENT

BRIAN WHITAKER

Senior Director, Client Services

Brian Whitaker joined Laird Norton Wealth Management in 2003 and is currently a senior director, client services. He has more than 25 years of experience in wealth management, and expertise in all aspects of wealth planning, including investments, tax strategies, and trusts and estates. His current practice includes leading LNWM's Ultra-High Net Worth team.

While Brian works with a wide variety of successful families, individuals and foundations, a specialty of his is closely held or family owned businesses, whose owners seek him out for guidance on their personal finances, as well as business succession strategies.

To find solutions for each client's unique needs, Brian uses an integrated approach, drawing on the collective expertise within LNWM to optimize investment portfolios, tax strategy, trust and estate planning. He also routinely connects clients with trusted experts outside LNWM in real estate, banking, education and other areas in which they may need guidance and advice. Brian typically works with all generations within families, helping them prepare for the next stage in life, be it retirement, starting a business, or establishing a legacy. To do that, Brian draws on his own personal experiences, as well as the institutional knowledge developed at LNWM since its launch in 1967.

Prior to joining Laird Norton Wealth Management, Brian was a client advisor at Allison Spielman Advisors, Dain Rausher and Merrill Lynch, where he was responsible for wealth planning and investment portfolio management. Brian is a CERTIFIED FINANCIAL PLANNER™ Professional and has a bachelor's degree in economics from North Park University in Chicago, Ill., where he serves on the board of the School of Business and Non-Profit Management. He is actively involved in advising and supporting local nonprofits, including as a member of Seattle's Social Ventures Partners and on the Corporate Council of 5th Avenue Theatre.