BRIAN WHITAKER

Client Advisor

Brian Whitaker joined Laird Norton Wealth Management in 2003 as a client advisor. Brian enjoys having meaningful discussions with clients, gaining a thorough understanding of their personal and financial concerns, and assembling the team and relevant resources necessary to help clients attain their objectives.

Brian draws on nearly 20 years of wealth management experience to develop customized personal financial plans that keep clients on track toward their life goals. Brian is especially adept at working with closely held or family owned businesses, advising owners on short- and long-term financial strategies. He also has extensive experience working with trusts, as a trustee and trust officer.

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 financial 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 also a member of Seattle's Social Ventures Partners.