



lairdnorton

WEALTH MANAGEMENT

CASSANDRA SCROGGS

Client Analyst



As a client analyst at Laird Norton Wealth Management, Cassandra helps to research and implement comprehensive investment and wealth planning strategies that are integrated, tax-efficient and tailored to achieve each client's life goals. With nearly 15 years of experience in financial services at firms large and small, Cassandra has a strong background in the various aspects of wealth management, including cash flow analysis, tax strategies, and philanthropic and legacy planning.

At LNWM, Cassandra is involved in both client-account management and wealth planning. Among other things, she works closely with LNWM client advisors to maintain the appropriate asset allocation strategy within client investment portfolios, to create a sustainability analysis that guides the client's long-term wealth plan, and to propose solutions that enhance the overall client relationship.

Cassandra began her career at JPMorgan Chase Bank and then worked with high-net-worth and ultra-high-net-worth clients at Highland Private Wealth Management. She is a CERTIFIED FINANCIAL PLANNER™ professional and has a B.A. in Experiential Learning, Interdisciplinary Studies from Eastern Washington University. She is actively involved with Women in Finance, Seattle chapter.