lairdnorton
WEALTH MANAGEMENT

CHARLENE FARKAS

Senior Client Analyst

Charlene Farkas joined Laird Norton Wealth Management in 2006 and is a senior client analyst. In her current role, Charlene works closely with clients to help them make fully informed financial decisions. A CERTIFIED FINANCIAL PLANNER™, Charlene then helps to create customized financial plans that effectively address the unique needs of each client.

As an LWNM client analyst, Charlene is involved in all aspects of client account management and financial planning. Her duties include working closely with LNWM client advisors to create, implement and monitor client financial plans, to maintain the appropriate asset allocation strategy within client portfolios, and to propose solutions that enhance the overall client relationship. She is also a member of LNWM's Elder Planning Group, an in-house team dedicated to the development of resources for clients nearing retirement or already retired.

Charlene has nearly 20 years of experience in the financial services industry. Prior to joining Laird Norton Wealth Management, she worked as a planner for Seattle-based wealth management firm Cotton Financial Advisors.

Charlene holds a Bachelor of Business Administration from Western Washington University. In her spare time, she manages the finances of teams within the Seattle Junior Hockey Association and frequently chairs community food drives.