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WEALTH MANAGEMENT

DAVID BAKER

Senior Director, Investment Research



David Baker joined Laird Norton Wealth Management in 2006 and is currently Senior Director, Investment Research. As such, David is responsible for providing recommendations to LNWM's Chief Investment Officer pertaining to the design and implementation of LNWM's investment strategy. Specifically, David leads the portfolio modeling process, both for strategic and tactical positioning, including the development of capital market assumptions, portfolio optimization, and risk analysis.

David also guides LNWM's research process, as LNWM's sector-specific analysts seek out the mutual funds, separate account managers or limited partnerships best-suited for client portfolios, as well as the ongoing monitoring of such investments. In addition, David writes market and economic commentaries and is a key contributor to LNWM's quarterly investment outlooks.

Having worked in wealth management and financial services for more than 15 years, David has extensive experience in investment research and analysis, as well as client portfolio management. Prior to joining LNWM, David was a financial advisor at Pacific Capital Resource Group, a Bellevue, Wash.-based financial services firm. While there, David developed customized investment strategies and managed balanced portfolios with the ultimate goal of providing superior risk and return results for clients.

A Chartered Financial Analyst[®], David holds a Bachelor of Arts in Business Administration from the University of Washington.