CARL LINDGREN

Client Analyst

Carl Lindgren joined Laird Norton Wealth Management in 2015 and is currently a client analyst. With a background in accounting and a penchant for long-term planning, Carl helps clients consider the pros and cons of each financial decision, not just now but well into the future. He then draws on LNWM's in-house expertise to provide truly integrated wealth management that aligns all aspects of clients' financial lives with their goals and needs.

In his current role, Carl is involved in all aspects of client-account management and financial planning. His 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.

Carl has a bachelor's degree in Business Administration from the University of Washington and is a CERTIFIED FINANCIAL PLANNER™ Professional. He currently serves as a committee member of the Washington Open Invitational ProAm, benefitting the Folds of Honor Foundation. At LNWM, Carl is an active member of LNWM's NEXTGen Money Group, which advises young people on money management, as well as LNWM's Retirement Life Planning Group, and he is also a frequent contributor to the LNWM blog.