



Financial Planning for Widows and Widowers

Grief doesn't have a timeline. When your spouse or partner passes away, everything comes to a standstill. And yet...this very private event becomes public. There are all sorts of people and issues to deal with.

The settling of an estate usually takes more than one year. And this also happens to be when families want to be left alone to deal with their loss.

We understand. For more than 50 years, Laird Norton Wealth Management (LNWM) has helped its new and existing clients transition after the death of a life partner.

Often, the surviving partner is the executor. With this comes a great deal of responsibility at a time when thinking clearly or for the long term is most difficult.

And that's exactly why our clients turn to us. We know what the family values are, the intended legacy and the plans for the future. Just as important, we have all the relevant family financial documents and history at the ready.

We listen, then we act

Most importantly, we listen. We stop the clock, and we talk to you about what you want, what you think is important. At the same time, we work closely with your attorney and accountant so that your financial interests are protected and in line with state and federal regulations. We're strategic and careful in tying up all the loose ends, including:

- Help in determining estate assets and liabilities; what must go through probate.
- Strategic thinking about which assets, if any, should be sold and when.
- Determining the most beneficial funding sources to pay the various taxes.
- If a trust has automatically been created, the most effective way to fund it.
- Explaining estate assets and investments to the heirs and beneficiaries.
- Financial planning anew for the family, with perhaps different needs and goals.

In this time of grief, Laird Norton Wealth Management is a life enabler, as well as a wealth planner. As a fiduciary, we act in our clients' best interest always – but especially during times of crisis and transition.

Financial partners for life

We stay by your side for the long haul. After helping you transition to a new life after the death of a spouse or life partner, we provide the support you need to feel financially secure: world-class investment management; in-depth financial planning; tax strategies; budgeting and cash flow modeling...and anything else that arises on your new life path.



As a fiduciary, we are legally obligated to act in your best interest at all times with no hidden agenda or fees. You can be secure in knowing that the advice we give you is what we are convinced will work best for you and your family, based on our experience and expertise. Especially during life's major transitions, we work to provide you with peace of mind and readiness for the future.

Laird Norton Wealth Management has been serving high-net-worth families in the Pacific Northwest for more than 50 years. We are here to help.



Behavioral Finance: Recognizing Biases and Avoiding Mistakes

Learning how to identify emotional bias and faulty logic is key to successful investing.

[Find out more](#)



ABOUT LAIRD NORTON WEALTH MANAGEMENT

With nearly \$6 billion in assets under advisement, Laird Norton Wealth Management is the Northwest's premier wealth management company. Founded in 1967 to serve the financial management needs of the Laird and Norton families, the firm now provides integrated wealth management solutions to more than 700 individuals, families, business leaders, private foundations and nonprofit organizations.

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