JULIE DOWELL

Client Analyst

Julie Dowell joined Laird Norton Wealth Management in 2013 and is a client analyst. In her current role, Julie helps clients envision all their options so they can make fully informed, long-lasting decisions. A financial advisor to high-net-worth households for over 20 years, Julie enjoys helping clients align their financial resources with their personal goals and philanthropic desires.

As an LNWM client analyst, Julie 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.

Prior to joining Laird Norton Wealth Management, Julie was a Vice President and Financial Consultant at Charles Schwab & Co. in Seattle, where she worked for over 20 years, and most recently, she was a financial advisor at Appropriate Balance Financial Services. At both firms, Julie provided comprehensive financial planning and investment advice and was sought out by clients for her comprehensive approach and insights. Julie has a Bachelor of Arts in Business Administration from Pacific Lutheran University and is a CERTIFIED FINANCIAL PLANNER™ professional.