KATE DONNELLY

Senior Director, Client Services

Kate Donnelly joined Laird Norton Wealth Management (LNWM) in 2021 as a senior director, client services. She brings to her work nearly two decades of experience in wealth planning and investments, focused on providing integrated solutions for the multi-faceted needs of high-net-worth individuals and families as well as nonprofit organizations.

While the strategies and tools Kate uses vary widely, the goal is the same: the purposeful allocation of client assets – money but also time, skills, and other resources – to support and nurture what each client values and believes is necessary to create a better future. This can include traditional estate planning and family giving as well as experimentation with new philanthropic and investment models, especially at the local level.

In working with clients, Kate draws on a wide variety of LNWM in-house expertise – investments, planning, trusts and estates – plus the institutional knowledge at LNWM that comes from decades of working with many generations within families, philanthropies, and philanthropists. The result is strategies that are well-thought-out, creative, and provide long-lasting shared value for all involved.

Prior to joining LNWM in 2021, Kate was at Threshold Group (now Tiedemann Advisors) for eight years as a wealth advisor, where she also directed the company's Community Square initiative, and opened and co-led the Portland, OR office. Kate started her career at LNWM, where she was a valuable member of the LNWM client services team (2004 – 2013), joining as a client associate and rising to become a senior analyst. Having launched her career at LNWM and now returning, Kate appreciates LNWM's unwavering commitment to independence, inclusivity, and lifelong learning.

Kate is involved in the Seattle and Portland communities, including serving on People's Economy Lab Community Capital Working Group. She is a fellow in the Northwest Conservation Philanthropy Fellowship, which was founded in Seattle, and was integral in launching the first Portland, OR cohort in 2020. She is a CERTIFIED FINANCIAL PLANNER™ professional and holds a bachelor's degree in elementary education from Bucknell University.