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WEALTH MANAGEMENT

## KRISTI MATHISEN

Managing Director of Tax and Financial Planning



Kristi Mathisen joined Laird Norton Wealth Management in 2006 and is the managing director of tax and financial planning. She serves as a technical resource for client advisors and analysts, including helping to develop protocols that identify appropriate tax and financial strategies for the benefit of clients. She also writes articles and white papers that provide expert tax-related insights and analysis. Kristi is an attorney, a CPA and Personal Financial Specialist (PFS) with more than 25 years of finance-related experience.

Prior to joining Laird Norton Wealth Management, Kristi spent 16 years at Bader Martin P.S., a certified public accounting and business advisory firm. As co-director of the Bader Martin tax practice, she integrated tax strategies with financial and business planning for individuals and families, as well as for private and family-owned businesses. She also provided consulting services to private foundations and not-for-profit organizations. Previously, she was a member of the tax staff at Laventhol and Horwath, a national public accounting firm, for six years.

Kristi earned a bachelor's degree in business administration with an accounting concentration from the University of Washington and a Juris Doctor from the University of Washington School of Law. She is a member of the Washington State and King County Bar Associations.

In addition, Kristi is a member of the Washington Society of Certified Public Accountants and the American Institute of Certified Public Accountants. She is an active member of the Seattle CPA Roundtable, Treasurer of Washington Women in Tax and 2014 President of the Washington Planned Giving Council. Kristi is also a past president of the Estate Planning Council of Seattle and the University of Washington Estate and Gift Planning Council. She is a member of several planned giving advisory groups for local nonprofits, including the University of Washington, the King County Library Foundation and The Nature Conservancy.