

Our Experience and Your Foundation Can Achieve Great Things



A Legacy of Success

For over 50 years, Laird Norton Wealth Management (LNWM) has strategically managed the investments of foundations and other nonprofits so they can continue to provide vital services and resources to their communities.

We are: collaborative, highly interactive and focused on your goals.

Working closely with your Board and investment committee, we create a financial road map and investment plan designed to meet the foundation's current needs and accomplish its long-term goals.

- We thoroughly assess your foundation's financial statements, operating plan, risk exposure, and compliance with IRS regulations. We help you determine to what extent your foundation's finances can support its goals, and what changes can be made to bring the two closer into alignment.
- As challenges and opportunities arise, we help your Board members evaluate the long-term impact on finances so they can make well-informed decisions.

Is a Family Foundation Right for You?

What is the best way for you and your family to create a lasting legacy? We can help you answer that key question with confidence, including whether a new foundation is the best approach.

For existing foundations, we implement investment plans that are fully aligned with your goals, control for risk, and target sustaining levels of return.

We Are Committed to Helping Communities Thrive

We work with foundations and non-profits as financial advisors, but also as volunteers, board members and sponsors. As a Top 75 Puget Sound Philanthropist, LNWM understands what it takes to get major initiatives started and to follow through with exemplary execution. Two of LNWM's recent community efforts: we co-founded *The King County Parks Foundation*; we worked with more than a dozen local non-profits to sponsor *Pianos in the Parks* (2014-2016).



Learn More: To find out more about Laird Norton Wealth Management's work with foundations and endowments, please call or email us.

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