MEDIA FACT SHEET

COMPANY OVERVIEW

With nearly $5 billion in assets under advisement, Laird Norton Wealth Management (LNWM) is the Northwest's premier wealth management company. Headquartered in Seattle, Washington, the company provides wealth management services for more than 600 high-net-worth individuals, families, business leaders, private foundations and nonprofit organizations.

Laird Norton Wealth Management (LNWM) is both a trust company (registered with the state of Washington) and a registered investment advisor (RIA) regulated by the Securities & Exchange Commission. As such, LNWM offers a wide array of integrated services to address the varied and complex needs of high-net-worth clients.

Laird Norton Wealth Management started out in 1967 as the Laird Norton Trust Co., to manage the financial assets of the Laird and Norton families, which today comprise about 25% of LNWM's asset base. In 2004, the Laird Norton Trust Co. merged with wealth management firm Tyee Asset Strategies, LLC to form what is today Laird Norton Wealth Management. LNWM remains an independent firm privately owned by the Laird Norton Co., a seventh-generation family business.

SERVICES OFFERED

Laird Norton Wealth Management offers a personalized and integrated approach to wealth planning combined with exceptional client service. The firm works closely with its clients to consistently assess whether their finances are on track to meet their needs and attain their life goals. The services LNWM offers to individuals, families, foundations and endowments, include:

- Investment management
- Financial planning
- Trust and estate planning
- Risk management
- Goal setting, governance and education
- Wealth transfer and philanthropic strategies

FEE-ONLY INVESTMENT MANAGEMENT

LNWM provides only those solutions and strategies that best serve each client's needs. There are no hidden fees or sales commissions driving the company's advice or recommendations.

EMPLOYEES

LNWM consists of more than 70 individuals with expertise in every aspect of wealth management and the highest professional designations, including Chartered Financial Analyst (CFA), Certified Public Accountant (CPA), Juris Doctor (JD), Master of Laws (LL.M), Certified Financial Planner (CFP®) and Certified Trust and Financial Advisor (CTFA).

EXECUTIVE TEAM

Robert Moser, *Chief Executive Officer and President*
Matt Englizian, *Managing Director of Strategic Planning*
Jeanne Goussev, JD, CTFA, *Managing Director of Fiduciary Services*
Robert Hille, JD, *General Counsel and Chief Compliance Officer*
Kristi Mathisen, CPA, JD, PFS, *Managing Director of Tax and Financial Planning*
Erin Moyer, *Managing Director of Marketing and Communications*
Gino Perrina, Ph.D., CFA, MBA, *Chief Investment Officer*
Dana Rekow, CPA, *Managing Director of Client Services*

THE LAIRD NORTON FAMILY LEGACY

The Laird and Norton families' legacy started in 1855, with two brothers and their cousin who operated a milling and manufacturing company in the Midwest. In 1900, the Laird and Norton families partnered with Frederick Weyerhaeuser to acquire and manage timberlands in the Pacific Northwest and founded the Weyerhaeuser Company.

By 1963, the Laird and Norton families had founded many companies in the forest products industry, such as Potlatch Lumber Company, Boise Payette Lumber Company and General Timber Company. This success, along with an infusion of capital from the Initial Public Offering (IPO) of Weyerhaeuser, resulted in the need for trust administration and asset management services, which prompted the founding of Laird Norton Trust Company in 1967.

LOCATION

The Norton Building
801 Second Avenue, Suite 1600
Seattle, Washington 98104

MEDIA CONTACT

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WEBSITE

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WEALTH MANAGEMENT

CELEBRATING 50 YEARS
1967 - 2017