MEDIA OVERVIEW

ABOUT LAIRD NORTON WEALTH MANAGEMENT

Laird Norton Wealth Management is the Pacific Northwest's premier wealth management company. Originally founded in 1967 to serve the financial and trust management needs of the Laird and Norton families, the company currently advises nearly $5 billion in assets for a range of clients that include families, business leaders, private foundations and endowments. The firm is located in the historic Norton Building in downtown Seattle and employs more than 80 people.

The company offers personal strategic planning; financial, wealth and estate planning; investment stewardship, family governance and education; business owner advisory services; generational wealth transfer and philanthropic strategies; and client education programs.

INVESTMENT PHILOSOPHY

The firm's investment philosophy is based on the principles of Modern Portfolio Theory, strong strategy and the investment judgment and experience of its team. Through a carefully managed process, each advisor develops a mix of diversified, customized investments based on their client's unique needs, overall goals and risk tolerance — a methodology that grows and protects assets over the long term.

INNOVATIVE APPROACH

Laird Norton Wealth Management offers individuals and their families the proven expertise they need to feel secure that their financial assets will be managed to meet and exceed their goals. The firm's advisors approach the personal side first, and then align the financial side to best support those desires.

With a time-proven investment model, a passion for exceptional client service and an extremely personalized approach, the firm has been successfully serving the complex wealth management needs of its clients for over 45 years. While the firm applies its research-based, proprietary investment strategy to all portfolio recommendations, each client's situation, needs and goals are treated individually with continuous updates and modifications over time.

Laird Norton Wealth Management is an independently owned and managed company that follows an open architecture philosophy. With no proprietary products or compensation from fund managers or other outside sources, the firm's advisors are unbridled and thoroughly transparent in their ability to give their clients the most sound, innovative financial advice to fulfill their specific needs. Rather than awarding commissions, which are common in the investment industry, Laird Norton Wealth Management compensates its advisors only for the expertise they provide their clients, underscoring the firm's commitment to putting clients' interests first.

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