MEDIA OVERVIEW

ABOUT LAIRD NORTON WEALTH MANAGEMENT

Laird Norton Wealth Management (LNMW) is the Pacific Northwest's premier wealth management company. Founded in 1967 to serve the financial and trust management needs of the Laird and Norton families, the company currently has nearly $5 billion in assets under advisement for a range of high-net-worth clients, including families, business leaders, private foundations and endowments. The firm operates out of the Norton Building in downtown Seattle and employs more than 70 people.

LNWM offers comprehensive wealth management via strategic financial planning; trust and estate planning; and investment management. Its services include strategies for business ownership and succession, multi-generational wealth transfer, philanthropic giving, and educating clients and their families about financial matters.

LNWM offers individuals and their families the expertise they need to achieve financial security and to thrive in every aspect of their lives. LNWM advisors focus first on each client's personal goals and aspirations and then manage their finances accordingly, making adjustments along the way as clients undergo major life changes or transitions.

INVESTMENT PHILOSOPHY

LNWM's investment philosophy is based on the principles of Modern Portfolio Theory, grounded in the investment analysis and insights of its Investment Strategy and Research (ISR) team, and an ongoing emphasis on risk management. LNWM develops for each client a diversified, customized portfolio that is aligned with that client's unique needs and goals.

Laird Norton Wealth Management is an independent and privately owned company founded by clients for the benefit of clients. None of LNWM's employees work on sales commissions or other incentives to promote investments. LNWM advisors are paid only for the expertise they provide to clients, underscoring the firm's commitment to putting client interests first.

INNOVATIVE APPROACH

Laird Norton Wealth Management (LNWM) advises clients based on a 360-degree view of their finances. Not just their investments but all of their assets: properties, businesses, and even the human capital waiting to be developed within their families, as they transition from one phase of life to another. The benefits of LNWM integrated approach to wealth planning tend to compound over time and through multiple generations.

The factors that distinguish LNWM services: A time-proven investment model; a passion for exceptional client service; and a personalized, integrated approach to wealth management.

lairdnorton WEALTH MANAGEMENT

CELEBRATING 50 YEARS 1967 - 2017