PENNY BUNCH

Senior Trust Analyst

Penny Bunch joined Laird Norton Wealth Management in 1985 and is currently a Senior Trust Analyst. In her current role, Penny collaborates with a team of financial professionals to find solutions that effectively address the individual needs of clients.

With more than 35 years of experience in the wealth planning field, Penny has developed a deep understanding of trusts and estate planning issues. She has forged close relationships with multiple generations within LNWM client families and truly understands the complex wealth transfer issues they often face.

As an LNWM senior trust analyst, Penny is involved in all aspects of trust management and planning. Her duties include working closely with LNWM advisors to create, implement and monitor trust portfolios, to maintain the appropriate asset allocation strategy, and to propose solutions that enhance the overall client relationship.

Penny holds the Certified Trust and Financial Advisor designation and is an honors graduate of the Cannon Financial Institute.