PUGET SOUND FINANCIAL

As Seen In
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Founded by Clients for Clients

With Laird Norton Wealth Management, clients get an advocate and steward for their wealth, their life vision, and their legacy.

Laird Norton Wealth Management, a major Seattle-based firm with more than $5 billion in assets under advisement, has built its business and reputation on transparency, honesty, and values. Such characteristics, says Bob Moser, Laird Norton's President and CEO, are ingrained in the very DNA of the firm.

"More than 50 years ago, Laird Norton Wealth Management [LNWM] was founded by clients for clients out of the need for trust services that aligned with their best interests," he says. Today the firm continues to serve its founding families as well as a wide range of dynamic, successful individuals, families, and foundations in all financial matters, from strategic financial planning to investment management, trust services to tax planning.

"Success has many parts, and ensuring our clients' financial peace of mind is our top concern."

Family Wealth Specialists

It's a natural extension of LNWM's founding that the firm excels in working with innovators—from first-generation entrepreneurs planning their futures to families who have created substantial multigenerational wealth from successful family businesses. In fact, the Laird and Norton families who founded the firm to serve their own needs are now in the seventh generation as owners of a

growing number of successful businesses. Attaining that level of longevity demonstrates that success is about more than wealth, Moser says.

"Managing human and emotional capital is even more important than money," he asserts. "When family wealth isn't well managed—when it lacks governance, doesn't have an established decision-making process, or family members are unable to partake in civil discourse—chaos can ensue."

LNMW seeks to integrate all aspects of a family's wealth—both human capital and financial capital—in a way that promotes desired outcomes across generations.

"In that way, I suppose we're a bit like family counselors," says Moser. "We help our clients establish guidelines for governance and blueprints for a lasting legacy, all based on the values important to them. The bottom line is that at LNWM clients get financial strategies that benefit their families, their wealth, their businesses, and their legacy. New clients often come to us because they want to apply what's worked for generations to the vision they have for their own futures. That's powerful."

Strengthening Community

The LNWM team's values, meanwhile, are manifested in community partnerships and engagement. "We understand that we have an opportunity to create more socially connected communities, not just an obligation to give back," Moser says.

In recent years, LNWM has spearheaded unique public-private partnerships that protect the region's water and wildlife, enhance parks and green spaces, and encourage a love of music and art. It has also partnered with major cultural institutions to create educational campaigns and financial strategies that build lasting connections with their patrons and donors. The firm partnered with 23 nonprofit organizations in 2017.

"We take great pride in creating community partnerships that strengthen the social fabric of our region," Moser adds. "The Pacific Northwest is one of the most philanthropic parts of the country, so when we say that we live our clients' values—from our founding families to the many more we work with today—that means we're engaging with them on what matters most, from their financial success to their personal passions."

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