TRACI TIPPLE

Client Analyst

Traci Tipple joined Laird Norton Wealth Management in 2018 and is currently a client analyst. In this role, Traci works closely with LNWM client advisors to put in place investment and financial plans that align with client needs, goals and aspirations. Traci brings to her work insights and expertise developed over nearly 20 years of experience as a financial planner, analyst and portfolio manager. A special area of interest for Traci is working with clients undergoing major life transitions.

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

Prior to joining LNWM, Traci was a financial advisor at Merrill Lynch and a research analyst at Russell Investments. Traci has a Bachelor's degree in Business Administration from Pacific Lutheran University and is a Chartered Financial Analyst® (CFA®). She is a member of the Institute of Chartered Financial Analysts and the CFA Society.