

Kelly E. Sweet

Client Advisor



Kelly E. Sweet is a client advisor with 20 years experience in the financial advisory field. Clients benefit from her expertise and background in legacy planning, investment management and individual tax planning. She has experience helping owners of wealth develop philanthropic mission statements, then advising and monitoring implementation. When working with entrepreneurs, Kelly focuses on helping them to retain liquidity outside of their business or venture activities. She encourages people to step back and look strategically at the direction they wish to go, then focuses on implementing the details and stewarding the process through to the desired results. With her background in accounting, Kelly is skilled at working collaboratively with a client's CPA and attorney to bring about good solutions and positive outcomes.

Kelly helped launch Tyee Asset Strategies (now Laird Norton Tyee) in 1995 and served as chief knowledge officer. Previously, she was a tax and financial planning manager at Moss Adams, an accounting, tax and consulting firm, working closely with high-net-worth individuals and small businesses as they defined and pursued their goals. Prior to Moss Adams, Kelly was a member of the tax staff at Arthur Andersen, serving individual and nonprofit clients. While holding these positions, Kelly worked through nine individual tax seasons, gaining a deep understanding of the impact of filing requirements, when to rely on the services of an accountant, and the effect investment decisions have on taxes.

Kelly earned a bachelor's degree in business with a concentration in accounting from the University of Oregon. She has earned the Certified Public Accountant designation and is a Certified Financial Planner™ professional. She is a member of the Washington Women's Foundation.