

## Media Fact Sheet

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### Company Overview

With more than \$3 billion in assets currently under advisement, Laird Norton Tyee is one of the largest privately-held full-service wealth management companies in the Pacific Northwest.

Founded in 1967 and headquartered in Seattle, Washington, the company provides comprehensive, objective and pragmatic financial services for more than 425 high-net-worth individuals, families, business leaders, private foundations and nonprofit organizations.

Laird Norton Tyee was originally founded by the Laird and Norton families as their exclusive trust company. In 1979, Laird Norton Trust Company began serving outside clients and family members now represent about 25 percent of the firm's client base.

In 2004, Laird Norton Wealth Management Inc. combined its Laird Norton Trust Company and Tyee Asset Strategies LLC operations under one name, Laird Norton Tyee. Today, Laird Norton Tyee offers a broad range of clients the same high-quality services and advocacy that the company was founded upon.

### Services Offered

Laird Norton Tyee works closely with its clients to continually assess their goals and changing needs. The firm offers a wide range of services including:

- Investment stewardship
- Personal strategic planning
- Financial, wealth and estate planning
- Family governance and education
- Generational wealth transfer and philanthropic strategies
- Client education programs

### Employees

The Laird Norton Tyee team includes more than 80 individuals with expertise in every aspect of wealth management and the highest professional designations including Chartered Financial Analyst (CFA), Certified Public Accountant (CPA), Juris Doctor (JD), Master of Laws (LL.M), Certified Financial Planner (CFP®) and Certified Trust and Financial Advisor (CFTA).

### Executive Team

Robert Moser	<i>Chief Executive Officer and President</i>
Robert Benson	<i>Chief Investment Officer</i>
Robert Hille	<i>General Counsel and Chief Compliance Officer</i>
Kaycee Krysty	<i>President Emerita</i>
Kristi Mathisen	<i>Managing Director of Tax and Financial Planning</i>
Barbara Potter	<i>Executive Vice President/Managing Director of Fiduciary Services</i>

### **Tyee, the Great Chief**

Tyee is a term of tremendous respect bestowed on great leaders in the Native American cultures of the Pacific Northwest. These leaders were well known for sharing their abundance with others. In this spirit, LNTyee has become a leader in the wealth management industry by sharing knowledge about the human, intellectual and financial implications of great wealth. As a result, the firm's clients — who are great leaders themselves — lead prosperous lives while planning for future generations. Using Tyee in the company name reflects the traditions of giving and leadership.

### **Open Architecture Philosophy**

Laird Norton Tyee practices an open-architecture philosophy in order to provide the most valuable solutions and strategies to best serve our client's myriad needs. Our clients know there are no hidden fees, in-house products or commission incentives driving our recommendations.

### **The Laird Norton Family Legacy**

The legacy was created in 1855 by two brothers and their cousin who jointly operated a milling and manufacturing company in the Midwest. Hard work, ingenuity and the growth of industry built a thriving company with capital for expansion, and in 1900, the Laird and Norton families partnered with Frederick Weyerhaeuser to acquire and manage timberlands in the Pacific Northwest and create the Weyerhaeuser Company.

Through the middle of the 20th century, the Laird and Norton families founded many companies in the forest product industry, such as Potlatch Lumber and Company, Boise Payette Lumber Company and General Timber Company. This success along with an infusion of capital from the Initial Public Offering (IPO) of Weyerhaeuser in 1963 resulted in the need for trust administration and asset management services, which prompted the founding of Laird Norton Trust Company in 1967.

### **Location**

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### **Web Site**

[www.LNTyee.com](http://www.LNTyee.com)