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Lorraine Monick has spent more than 20 years developing tax-efficient strategies, as well as advising clients on spending policies, asset/liability matching, and concentrated stock management. Her capacity for understanding both the big picture and the fine details allows her to embrace the broad range of investment challenges and opportunities her clients face in managing, preserving and growing their wealth.

At Harris myCFO Investment Advisory Services, LLC, Lorraine and her team work closely with Family Office Services professionals to provide clients customized plans for achieving their investment, tax, wealth transfer, and risk management goals.

Lorraine is a graduate of the University of Victoria where she earned a BA in Economics, and later an MPA with a concentration in Public Finance. She is a CFA® charterholder and an active member of the CFA Society of San Francisco.

Lorraine is past President of the East King County Estate Planning Council, and served as Vice President of the Bellevue Philharmonic Board.

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