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Lori Kaufman, CFP® Co-Founder and Chief Executive Officer

Lori co-founded Kaufman Kampe Advisors to bring the benefits of her institutional knowledge to individual investors. As a top-level investment executive with over 25 years of experience in asset management and financial planning, she has served both institutional and high-net-worth clientele. Lori currently serves on the TIAA-CREF Board of Financial Advisors and on the Board of Directors for FinanceXpert. She also is a member of the Financial Planning Association.

Lori previously served as Chief Investment Officer for Laird Norton Tye after holding a similar position at Northwestern Mutual Trust Company (an affiliate of Northwestern Mutual Life). Earlier in her career, she held several senior executive positions with Russell Investment Group, including Vice President of Manager Research, Senior Portfolio Manager, and Director of Alternative Investments. Lori also provided strategic corporate and consulting services while at Deloitte Consulting and Ford Motor Company.

Lori earned a Master of Business Administration degree in Finance from the Wharton School at the University of Pennsylvania and a Bachelor of Arts degree in Asian Studies from the University of Michigan. She is a CERTIFIED FINANCIAL PLANNER™ professional and holds a Series 65 license. In addition to her native English, she speaks Mandarin Chinese and French. Outside the office, Lori enjoys hiking and skiing with her husband and two sons.

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