

CERTIFIED EVERGREEN®

Built to last for the families who rely on us

In September 2026, Tugboat Institute certified Northwest Trustee & Management Services, LLC as Certified Evergreen®, after an independent assessment of how the company is owned, run, and built to endure.

WHAT IT MEANS

Certified Evergreen® companies are private, purpose-driven businesses that have passed a rigorous third-party assessment against the Evergreen 7Ps®, Tugboat Institute's principles for companies built to thrive for a hundred years or more. The assessment draws on company data and a survey of employees.

WHY IT MATTERS TO YOU

A trust can run for generations. Certification is independent evidence that the trustee holding it is built for that timeline: majority family-owned, funded by its own earnings, and guided by a written purpose rather than an outside shareholder's clock.

“Our enduring purpose is to steward family wealth now to enrich lives and communities.”

For the attorneys, advisors, and accountants who refer families to Northwest Trustee, it means the firm you recommend today is built to be the same firm your clients rely on decades from now.

THE EVERGREEN 7PS® AT NORTHWEST TRUSTEE

Purpose	Employees know why Northwest Trustee exists, and it shapes how they make decisions.
Perseverance	Growth is funded through earnings, not outside capital.
People First	Low turnover, so the people who know a family's trust stay with it.
Private	Majority family-owned, with a plan for governance across generations.
Profit	Strong, steady earnings that let Northwest Trustee invest for the long term.
Paced Growth	Growing by adding roles and expertise, including in Seattle.
Pragmatic Innovation	Testing new ideas in small, practical ways before expanding on them.

To learn more

Aaron McMurray, PhD, Chief Client Development Officer · (509) 466-3024 · amcmurray@nwtrustee.com

nwtrustee.com

Certified Evergreen® and the Evergreen 7Ps® are registered trademarks of Tugboat Institute®.