



Howard Lee

Chief Operating Officer
Loring Ward

As Vice President of Advisor Services with Loring Ward, Howard oversees the operations and service teams which handle all advisor account processing tasks, including all transactions, trades and client interactions. He focuses on ways the team can uphold its high standards for responding in a timely way to all advisor and client needs, while ensuring that accuracy and service is the highest priority.

Howard joined Loring Ward in 2004 as an account manager in the new business division. Previously he worked at E*Trade as a client service specialist.

Howard holds Series 7, 63 and 24 securities licenses and earned his BA in English from UC Davis.

He lives in the Bay Area with his wife and two children.