



## Howard Lee

Managing Director, Advisor Services  
Loring Ward

As Chief Operating Officer at Loring Ward, Howard Lee oversees overall service delivery to advisors, continually looking for ways to deliver excellent service to our clients. He is responsible for the execution of internal and external technology projects as well as working with custodians and technology vendors on behalf of our clients.

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.