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## FOR IMMEDIATE RELEASE

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### **Bordeaux Wealth Advisors Announces Partner Promotion**

*James Hering named partner to help advance firm's strategic growth plan*

**MENLO PARK, CA (10 January 2022)** – [Bordeaux Wealth Advisors, LLC](http://www.bordeauxwealthadvisors.com) ("Bordeaux"), a boutique investment advisory and wealth management firm, is pleased to announce the promotion of James Hering to Managing Partner. Mr. Hering is based in Bordeaux's Menlo Park office.

The growth of the senior team to six partners expands Bordeaux's ability to serve clients in the Silicon Valley and Seattle areas, and the broader Western U.S. Hering's promotion adds more depth to the senior ranks of Bordeaux and also strengthens the sustainability of the firm over the long term, while also positioning the firm to attract other exceptional wealth advisory professionals.

"We are delighted to welcome James to the partnership," said Bordeaux CEO Thomas Myers. "James joined Bordeaux in October of 2020 and quickly made an impact as a senior wealth advisor on a significant number of Bordeaux's client engagements. He also helped to improve the internal operations of the firm in his COO role."

Hering brings over 30 years of executive leadership, investment advisory, and operating experience to Bordeaux and its growing client base. With a strong investment foundation across both traditional and alternative asset classes, James helps clients achieve their long-term financial goals through thoughtful investment advice that is integrated with all other aspects of their wealth planning.

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### **About Bordeaux Wealth Advisors**

Bordeaux Wealth Advisors provides custom and comprehensive financial and investment advisory services to ultra-high-net-worth clients across the U.S. The firm has offices in Silicon Valley and Seattle. For more information about Bordeaux, please visit [www.bordeauxwealthadvisors.com](http://www.bordeauxwealthadvisors.com).