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FOR IMMEDIATE RELEASE

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Bordeaux Wealth Advisors Announces Senior Promotions, New Seattle Office

Jon Ekoniak and Jon Snare named partners to advance firm's strategic growth plans and the firm's commitment to continuity planning

MENLO PARK, CA (31 March 2020) – [Bordeaux Wealth Advisors, LLC](#) ("Bordeaux"), a boutique investment advisory and wealth management firm, is thrilled to announce two new partners and an office expansion as part of a strategic growth initiative and commitment to firm succession and continuity planning.

Bordeaux recently named [Jon Snare](#) as Managing Partner of the firm's new Seattle office and promoted [Jon Ekoniak](#) to Partner in its Menlo Park headquarters.

The growth of the senior team to four partners and new office will help foster additional opportunities to expand Bordeaux's ability to serve additional clients in Silicon Valley, the Seattle area and along the West Coast. These moves are designed to enhance the sustainability of the firm over the long term, while also positioning the firm to attract other exceptional wealth advisory professionals.

"We are excited to have Jon Snare leading our new Seattle office and expanding our partnership with the promotion of Jon Ekoniak," said Bordeaux CEO and Managing Partner Thomas Myers. "These leadership additions will bolster our ability to grow our client base and help more clients achieve their individual financial goals, while providing new opportunities for other members of our team to advance in their careers."

Snare, who joined the Bordeaux team in January from Wells Fargo Private Bank, brings nearly 30 years of financial advisory experience to Bordeaux's clients. During his career, he has helped ultra-high net worth clients, from families to individuals, build customized integrated financial plans and investment portfolios.



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Ekoniak has an extensive understanding of the challenges that technology executives face daily, having worked as an equity analyst following software stocks, and as an executive at Oracle before returning to financial services. He joined Bordeaux in 2018 after serving as a senior managing director at Charles Schwab, where he led their consulting practice that worked with some of the country's largest independent registered investment advisory firms.

For Bordeaux, the new Seattle office brings the firm closer to its roots. Bordeaux has been serving families in and around Seattle for decades, with about 30% of Bordeaux's active clients located in the Seattle area.

"We have strong relationships in the Seattle market that we are looking to build upon with the new office. This strategic expansion also opens up a variety of new opportunities in the Pacific Northwest that we are excited to explore, which will further propel our team's growth," Ekoniak said.

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About Bordeaux Wealth Advisors LLC

Bordeaux Wealth Advisors LLC ("Bordeaux") provides custom and comprehensive financial and investment advisory services to ultra-high net worth clients across the U.S. The firm's headquarters are in Menlo Park, CA. For more information about Bordeaux, please visit bordeauxwealthadvisors.com.