



3000 Sand Hill Road, 1-150  
Menlo Park, CA 94025

(650) 289-1105 Office  
(650) 472-8016 Fax

[www.bordeauxwealthadvisors.com](http://www.bordeauxwealthadvisors.com)

## FOR IMMEDIATE RELEASE

**Media Contact:**

Jay Scott

[jscott@gavinadv.com](mailto:jscott@gavinadv.com)

484-695-3774

### **Bordeaux Wealth Advisors Makes Financial Advisor's 2020 Annual RIA List**

*California-based investment advisory and wealth management firm recognized for 2019 growth*

**MENLO PARK, CA (25 August 2020)** – [Bordeaux Wealth Advisors, LLC](http://bordeauxwealthadvisors.com) ("Bordeaux"), a boutique investment advisory and wealth management firm headquartered in Silicon Valley, announced today it has once again made Financial Advisor's prestigious list of top RIA firms<sup>1</sup>.

The annual FA RIA ranking showcases the top independent wealth management firms based on their size and year-over-year growth in client assets under management. The 2020 list highlights RIA growth in 2019, a year in which Bordeaux finished with \$2.5 billion in assets.

Due to its success with clients, Bordeaux has continued to grow its team of financial professionals, office locations and number of clients. In 2020, the full-service firm has experienced organic team growth of 50 percent and added two new partners to its leadership team. The company also opened a new office in Seattle to increase its capacity to serve clients in the Pacific Northwest.

"We are proud of our client performance and ongoing team growth. Our ranking on this respected list is a demonstration of our team's hard work and commitment to serving clients," said Jon Ekoniak, Partner at Bordeaux Wealth Advisors. "During these turbulent and unpredictable times, it's more important than ever to have a holistic advisor who understands a client's unique situation and can guide them on decisions involving financial planning, portfolio management, tax strategies and estate planning."

###

#### **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](http://bordeauxwealthadvisors.com).

<sup>1</sup>*Financial Advisor Magazine Top Registered Investment Advisor – 2020 Survey Methodology*  
*The report is an annual survey that ranks registered investment advisors (RIAs) based on percentage growth in assets from the previous calendar year and is the premier industry ranking of independent RIA growth. To be eligible for the ranking, firms must be independent registered investment advisors and file their own ADV statement with the SEC and provide financial planning and related services to individual clients. Firms must have at least \$300 million in assets under management as of December 31, 2019 to be included in the print edition of Financial Advisor magazine. Neither the RIA firms nor their employees pay a fee to Financial*



**BORDEAUX**  
WEALTH ADVISORS

3000 Sand Hill Road, 1-150  
Menlo Park, CA 94025

(650) 289-1105 Office  
(650) 472-8016 Fax

[www.bordeauxwealthadvisors.com](http://www.bordeauxwealthadvisors.com)

*Advisor to be included in the listing. Data is provided by each firm, mostly from numbers and information published on forms they submit to the SEC. Each advisor is then ranked alongside their participating peers. Only advisers that complete and submit Financial Advisor magazine's survey are included in the rankings. Financial Advisor magazine has not disclosed how many firms were invited to participate. Awards and recognitions by unaffiliated publications should not be construed by a client or prospective client as a guarantee that the client will experience a certain level of results; nor should they be construed as a current or past endorsement of Bordeaux or its representatives. This award does not evaluate the quality of services provided to clients and is not indicative of Bordeaux's future performance.*