



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 Barron's 2020 List of Top 100 Independent Advisors**

*West coast wealth management firm CEO recognized for the 11<sup>th</sup> year*

**MENLO PARK, CA (September 18, 2020)** – [Bordeaux Wealth Advisors, LLC](#) ("Bordeaux"), a boutique investment advisory and wealth management firm headquartered in Silicon Valley, today announced that [Tom Myers](#), the firm's CEO and Managing Partner, has been once again named to Barron's [2020 list of Top 100 Independent Advisors](#).

Barron's uses a ranking formula that analyzes the advisor's volume of firm assets, revenues they generated for the firm, and the quality of their practice. Bordeaux manages approximately \$2.6 billion of client assets.

Myers has more than 30 years of wealth advisory services experience with a background in investments, finance and taxation. Leveraging his extensive experience to help clients develop and maintain long-term financial strategies has earned him recognition by Barron's 11 times in his career. He was also named to [Barron's Advisor Hall of Fame in 2019](#) having made the list for the 10<sup>th</sup> time.

"I am humbled and honored to be named to this distinguished list again in 2020. Wealth management is a team sport and no one on this list makes it on their own. I am very proud of the team of exceptional client-focused professionals that I have the privilege of working with every day" says Myers. "Being named to this list year after year is recognition that we, as a firm, are consistently delivering high-value advice and exceptional client service for our clients as they seek guidance on financial planning, portfolio management, tax planning and estate planning decisions."

He holds an M.B.A. from the Wharton School of Business at the University of Pennsylvania and graduated cum laude from Miami University in Oxford Ohio with a Bachelor's in Business Administration (Accountancy).

###

### **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).



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)

**About Barron's**

Since 1921, Barron's has been a leading source of financial news, providing in-depth analysis and commentary on stocks, investments, and how markets are moving across the globe. Advisors appearing in Barron's ranking have answered over 100 questions about their businesses in the publication's annual survey. The questionnaire addresses a wide range of data points, including regulatory records, assets under advisement, number and caliber of firm professionals, industry designations, investment vehicles used to allocate assets, philanthropic work, and more.

**Disclosure:** Neither the adviser nor their employees paid a fee to Barron's in exchange for inclusion in the Barron's Top 100 Independent Advisor list. 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 BWA or its representatives. Rankings published by magazines and others are generally based on information prepared and/or submitted by the recognized adviser. The above-listed award does not evaluate the investment outcomes or quality of services provided to clients and are not indicative of BWA's future performance.