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### **Bordeaux Wealth Advisors Expands Holistic Approach to Sustainable and Values-Based Investing**

*As impact and ESG investment demand grows, Silicon Valley wealth management firm increasing private impact fund options to support ultra-high net worth client goals*

**MENLO PARK, CA (5 October 2020)** – [Bordeaux Wealth Advisors, LLC](http://www.bordeauxwealthadvisors.com) ("Bordeaux"), a boutique investment advisory and wealth management firm headquartered in Silicon Valley, is expanding its public and private market fund offerings to support values-based portfolio objectives for clients.

Socially conscious investing has proliferated in recent years as investors want to back funds that strive to deliver sustainable impact while providing comparable investment returns to that of traditional offerings. The global COVID-19 pandemic has accelerated Environmental, Social, and Governance (ESG) investing interest levels, and the strong relative returns realized by the S&P 500 ESG Index has only added momentum to this shift.

"Over the last year, we have seen a significant increase in investment interest surrounding ESG funds and Socially Responsible Investment themes," says [Tim Harvey](#), a Wealth Advisor at Bordeaux Wealth Advisors, who leads the firm's ESG research effort. "Our clients are looking for direct funding options to invest in more targeted initiatives around the world that give them a greater sense of purpose while also seeking acceptable portfolio returns and greater portfolio diversification."

Through its holistic approach, Bordeaux seeks customized strategies for qualified purchasers, or clients with at least \$5 million in assets, to invest in a growing group of private impact funds that have been vetted by the firm's research group. Recent fund searches include emerging opportunities in sectors such as:

- Global renewable energy, such as wind and solar power infrastructure
- Sustainable farming for food production
- Environmentally friendly urban housing projects

More broadly, Bordeaux's Investment Committee continues to research publicly traded ESG offerings to expand its comprehensive financial solutions and meet the ever-changing needs of its clients.

"While many clients are looking for those unique private investment fund opportunities, we are also positioned to provide a blend of public equity and fixed income assets exhibiting ESG characteristics that can complement client portfolios and deliver the long-term financial results they are seeking," Harvey remarks.

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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 has offices in Silicon Valley and Seattle. For more information about Bordeaux, please visit [bordeauxwealthadvisors.com](http://bordeauxwealthadvisors.com).