



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

11100 NE 8<sup>th</sup> Street, Suite 320  
Bellevue, WA 98004

[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 Hires COO and Wealth Advisor**

*Boutique advisory firm continues to expand its leadership ranks and client service capacity*

**MENLO PARK, CA (October 28, 2020)** – [Bordeaux Wealth Advisors, LLC](#) (“Bordeaux”), a boutique investment advisory and wealth management firm with offices in Silicon Valley and Seattle announced today that James Hering has joined the firm as Chief Operating Officer and Wealth Advisor.

Mr. Hering is based in the firm’s Silicon Valley office and comes to Bordeaux with 30 years of experience serving large ultra-high net worth families. Prior to joining Bordeaux, James served as the CEO of a large single-family office in San Francisco, and the COO for two large independent RIAs in Chicago.

2020 has been an exceptional year of growth for Bordeaux as demand for its comprehensive wealth advisory services -- which includes guidance on financial planning, portfolio management, tax strategies and estate planning - continues to grow at a record pace.

“We are thrilled to have someone of James’ caliber join our firm as we enter our next phase of growth. James brings a unique set of skills and an immense amount of experience that will enable Bordeaux to continue to thrive and grow in the coming years” – said Bordeaux’s CEO [Tom Myers](#).

Mr. Hering is a CFA (Chartered Financial Analyst) charterholder and he received his bachelor’s degree in financial administration from Michigan State University and an MBA from the Kellogg Graduate School of Management at Northwestern University.

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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).