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Bordeaux Wealth Advisors Makes Forbes Best-In-State Wealth Advisors 2021

Tom Myers, CEO of boutique wealth management firm included on prestigious list

MENLO PARK, CA (23 March 2021) – Tom Myers, CEO and Managing Partner of [Bordeaux Wealth Advisors](#) (“Bordeaux”), was recently named to the Forbes [Best-In-State Wealth Advisors 2021](#) list.

The Forbes ranking of Best-In-State Wealth Advisors, developed by [SHOOK Research](#), is based on an algorithm of qualitative criteria, gained through telephone, virtual and in-person due diligence interviews, along with quantitative data.

To be considered for the list, advisors had to have at least seven years experience, and the algorithm weights factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their approach to working with clients.

Myers has more than 30 years of wealth advisory services experience with a background in investments, finance and taxation. He leverages his extensive experience to help Bordeaux’s high-net-worth and ultra-high-net worth clients develop and maintain long-term strategies for preserving and enhancing their wealth.

“Being recognized by Forbes is a reflection of the hard work and dedication our firm’s dedication to client-focused strategies,” said Myers. “Bordeaux was founded on a vision and passion for providing the very best personalized financial and investment advisory services, and an unwavering focus on putting clients first. We strive every day to set the standard of excellence in our industry and appreciate the recognition.”

Myers 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).

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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.



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"Awards and recognition by unaffiliated rating services, companies, and/or publications should not be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results if Bordeaux Wealth Advisors ("BWA") is engaged, or continues to be engaged, to provide financial and investment advisory services; nor should they be construed as a current or past endorsement of BWA or its representatives by any of its clients. Neither BWA nor its representatives paid a fee to participate in any survey. Rankings published by magazines and others are generally based on information prepared and/or submitted by the recognized advisor. Moreover, with regard to all performance information contained herein, directly or indirectly, if any, users should note that past results are not indicative of future results. Please see below for a more detailed description of the criteria used with respect to the awards and recognition granted to BWA individual employees.

"Forbes Best-in-State list spotlights more than 5,000 advisors, nominated by their firms. Those advisors that are considered have a minimum of seven years' experience, minimum one year at their current firm, have completed an online survey, have over 50% of revenue/production with individuals, and have an acceptable compliance record. SHOOK Research developed this algorithm, designed to fairly compare the business practices of a large group of advisors based on quantitative and qualitative elements. Data are weighted to ensure priorities are given to dynamics such as preferred "best practices", business models, recent business activity, etc. Each variable is graded and represents a certain value for each measured component. This algorithm weights factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their approach to working with clients. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. These data are fed into an algorithm that measures thousands of advisors against each other. For this year, 32,725 nominations were received, of which 15,854 advisors were invited to complete the online survey based on the qualification thresholds. Rankings are based on the opinions of SHOOK Research, LLC and not indicative of future performance or representative of any one client's experience; the firm's research and rankings provide opinions for how to choose the right financial advisors. Neither Forbes or SHOOK receive a fee in exchange for rankings."