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## FOR IMMEDIATE RELEASE

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### **Bordeaux Wealth Advisors Named to Top 50 Fastest-Growing RIAs List**

*Boutique wealth management firm is #2 in Northern California*

**MENLO PARK, CA (26 July 2021)** – [Bordeaux Wealth Advisors](http://www.bordeauxadvisors.com) ("Bordeaux"), a boutique investment advisory and wealth management firm with offices in Silicon Valley and Seattle, today announced it has been named on [Financial Advisor's 2021 Top 50 Fastest-Growing Firms list](#).

This is the first time that Bordeaux has made the *Financial Advisor* list.

*Financial Advisor's* 50 Fastest-Growing Firms list is ranked by percentage growth in year-end assets under management (AUM). The 2021 list compared AUM totals from 2019 and 2020 for firms with more than \$500 million in AUM.

"We continue to grow with our clients in California and the Pacific Northwest. Our sustained growth is the direct result of the great work we do for clients each and every day. Our industry leading growth is also in keeping with our firm's strategic growth plan. Bordeaux has been expanding its roster of advisors to provide more clients with best-in-class wealth management solutions and personalized service," said [Tom Myers](#), CEO and Managing Partner at Bordeaux Wealth Advisors. "We are thrilled to be named among the 50 Fastest-Growing RIAs."

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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, with approximately \$3.47 billion in assets under management, as of December 31, 2020. For more information about Bordeaux, please visit [www.bordeauxadvisors.com](http://www.bordeauxadvisors.com).

*Being named to FA's 50 Fastest Growing Firms List 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 it 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*



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*performance information contained herein, directly or indirectly, if any, users should note that past results are not indicative of future results.*

*The FA RIA survey is a ranking based on assets under management at year end of independent RIA firms that file their own ADV with the SEC. FA's RIA ranking orders firms from largest to smallest, based on AUM reported to us by firms that voluntarily complete and submit FA's survey. FA attempts to verify AUM by reviewing ADV forms. 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 \$500 million in assets under management as of December 31, 2020 to be included in the print edition of Financial Advisor magazine's 2021 RIA survey. Firms with under \$500 million will be included the FA's expanded online RIA survey.*