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Bordeaux Wealth Advisors Expands Senior Team to Support Growing Client Needs

Experienced female wealth advisor, marketing director join growing West Coast firm

MENLO PARK, CA (9 August 2021) – On the heels of being named one of the [fastest-growing firms](#) in the country, [Bordeaux Wealth Advisors](#) (“Bordeaux”) is pleased to announce two additions to its senior team.

The boutique investment advisory and wealth management firm, which has offices in Silicon Valley and Seattle, has hired [Megan Mills](#), Wealth Advisor, and [Amy Ellisor](#), Director of Marketing.

Mills joins Bordeaux with more than a decade of experience advising ultra-high-net-worth families on philanthropic, estate planning, and wealth transfer strategies. She previously held roles as a senior trust advisor at Northern Trust and U.S. Trust, providing comprehensive fiduciary oversight, estate planning and tax guidance. In addition, she worked at Stanford University and Santa Clara University in roles focused on planning giving.

Mills received her law degree from UC Hastings College of Law and is an active member of the California Bar Association. She also earned her master’s degree from the Harvard University Graduate School of Education and her bachelor’s degree from UC Santa Barbara.

Ellisor has an extensive background in market research, retention marketing, and data and analytics. As Director of Marketing, she will support educating potential clients about the depth and breadth of Bordeaux’s suite of financial services.

Before joining Bordeaux, Ellisor led a marketing team at an award-winning Seattle accounting firm, positioning the \$26 million business for a successful sale to a national, public company. She is a magna cum laude graduate from Washington State University, where she received a bachelor’s degree in English literature and her master’s in business administration.

“We are ecstatic to add Megan and Amy and continue growing our senior team,” said [Tom Myers, CEO and Managing Partner](#). “Megan’s experience working with ultra-high-net-worth families on complex planning and estate services will enhance our depth in providing comprehensive wealth management solutions to our clients along the West Coast and in the Pacific Northwest. Amy’s knowledge and success in financial research and marketing will help amplify our unique approach to problem-solving for clients and expand awareness to prospects and future hires.”



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Last year, Bordeaux opened an office in Bellevue, Washington, to expand the firm's footprint and client service in the Pacific Northwest and support future talent recruitment. Bordeaux finished 2020 with approximately \$3.47 billion in assets under management.

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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.