PARCION
PRIVATE WEALTH

FOR IMMEDIATE RELEASE

Parcion Private Wealth Welcomes Jim Moore as Family Wealth Advisor

SEATTLE, April 5, 2021 – Parcion Private Wealth, a Seattle-area wealth management firm focused on helping business owners and entrepreneurs manage and optimize wealth events, recently welcomed Jim Moore to the team as a family wealth advisor.

Moore will assist with implementing planning and investment recommendations for a select group of families Parcion supports, including in areas such as financial modeling, advanced planning, and tax and estate planning. He will also oversee the delivery of Parcion's multi-family office services for the respective families he serves.

Moore has more than 23 years of experience in both institutional and retail wealth management and specializes in serving high-net-worth individuals and families with complex needs. He brings a broad range of experience having led many diverse and cross-functional teams, with a proven track record of guiding clients, businesses and colleagues toward a more intentional path.

"As the most senior client advisor Parcion has hired to date, Jim is an outstanding addition and valuable asset to our team who will help us continue to serve entrepreneurs and business owners managing wealth events," said Terry Cook, CFP, CIMA, Parcion founder and CEO. "His expertise and collaborative approach are an excellent representation of how our team provides individualized, thoughtful and impactful strategies."

Moore joins Parcion after managing projects and teams for top financial firms around the country, most recently as director and lead associate client manager at Cornerstone Advisors, Inc. based in Bellevue, Washington. In addition to his supervisory and client-facing duties, Moore developed Cornerstone's advisor training program and led the implementation and launch of its financial modeling software.

"Joining Parcion Private Wealth felt like a natural next step in my career," Moore said. "I'm honored and excited to be a part of a team that helps guide clients facing once-in-a-lifetime wealth events. Even more so, I look forward to forming ongoing partnerships with my clients over the long term."

Moore currently resides in Redmond, Washington, with his wife, son and rescued miniature schnauzer, Bentley. He is a licensed private pilot who enjoys fishing and doing almost any outdoor activity.

Moore received his Bachelor of Science in finance from Arizona State University and holds the Accredited Asset Management Specialist (AAMS) and Chartered Mutual Fund Counselor (CMFC) designations from the College for Financial Planning, along with his FINRA Series 65 certification.

To learn more about Parcion Private Wealth, please visit www.parcionpw.com.

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About Parcion Private Wealth

Parcion Private Wealth is an independent, multi-family office that partners with entrepreneurs, business owners and their families to optimize wealth events and beyond, through smart planning, strong advocacy and prudent investment management. Parcion's experienced team helps clients preserve the legacy they've built to support their families and communities. Learn more at www.parcionpw.com.

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