*** FOR IMMEDIATE RELEASE***

Parcion Private Wealth Elevates John de Carvalho to Co-Chief Investment Officer, Welcomes Halley Hu and Shanice Dawson

SEATTLE, June 11, 2021 – Parcion Private Wealth, a Seattle-area wealth management firm focused on helping business owners and entrepreneurs manage and optimize wealth events, recently elevated John de Carvalho to co-chief investment officer and welcomed Halley Hu and Shanice Dawson to the team.

"One of our goals when founding Parcion was to attract diverse, experienced and passionate professionals to join our team, and to give them opportunities to progress," said Terry Cook, CFP®, CIMA®, Parcion founder and CEO. "That's why I'm delighted to celebrate John's well-deserved promotion and to welcome Halley and Shanice to our team."

In his new role, de Carvalho enhances Parcion's investment philosophy and implementation process through research and analysis. de Carvalho will share chief investment officer duties with Parcion founder, Terry Cook, as they collaborate to set investment strategy and implementation for the firm's clients.

De Carvalho has been with Parcion since 2020 and brings almost two decades of considerable wealth management and leadership experience, previously serving as chief investment officer at two large Seattle-area registered investment advisors. He is adept at working with clients, ranging from business owners to corporate executives, families and institutions, to help them realize their goals and accomplish what is most important to them. De Carvalho studied economics and finance and received his bachelor's degree from the Foster School of Business at the University of Washington. He has also been a CFA® charterholder since 2004.

"Over the past year working at Parcion, I have been impressed and motivated by the passionate, skilled team that works tirelessly to support our clients," de Carvalho said. "Serving as Parcion's co-chief investment officer is especially rewarding as it allows me to find new opportunities to add value and affect positive change to help our clients reach their goals."

Halley Hu joins Parcion as an advanced planning specialist with expertise in wealth transfer, estate planning and other relevant tax and legal topics. Prior to joining Paricon, Hu spent several years gaining diverse experiences ranging from consulting and finance to research and teaching. A lawyer by training, Hu combines legal acumen with passion for psychology to understand and solve clients' most complex and challenging wealth planning issues.

Hu received her J.D. and LL.M. (taxation) from the Washington University School of Law, as well as a Bachelor of Arts in philosophy and a Bachelor of Science in economics from Duke University. She is a member of the New York State Bar and is currently pursuing a Certified Financial Planner® certification.

Shanice Dawson joins Parcion as a client service specialist, bringing over ten years of experience in client relations and account management. Prior to joining Parcion, Dawson was an account manager at a coemployer organization where she developed an extremely detail-oriented approach that stems from her passion for organizing, streamlining daily tasks and relationship building.

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

# # #

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.

Media Contact:
Julia Irwin Hatle
julia@firmani.com
206.466.2708