***FOR IMMEDIATE RELEASE***

# Parcion Private Wealth Celebrates Second Anniversary Surpassing $2 billion in Assets Under Management

***Bellevue, Washington-based firm adds to professional staff to cement world-class client experience***

**SEATTLE, Nov. 23, 2021 –** Parcion Private Wealth, a Seattle-area wealth management firm focused on helping business owners and entrepreneurs optimize wealth events, celebrated its second anniversary by announcing that it has expanded its ranks of seasoned professionals while doubling its assets under management to $2 billion in just over a year.

"This is an exciting milestone for Parcion because it allows us to create a more robust array of services and expertise," said Parcion Managing Principal Terry Cook, CFP®, CIMA®. "It also gives us the ability to continue to attract top talent and provide our clients with unparalleled service that exceeds their expectations."

As the firm reached its two-year mark, Parcion welcomed four experienced professionals to its ranks.

Kevin Penner joined Parcion as a senior family advisor and provides a high level of service to clients through his extensive planning knowledge and experience in financial planning. He is a Certified Financial Planner (CFP) and is a University of Nevada, Las Vegas graduate and came to Parcion from Pathstone (formerly Cornerstone). Prior to that, spent some time as a professional golfer on the PGA Tour.

Parcion also welcomed Lindsey Briggs, JD, LLM, who joined the team as director of advanced planning, overseeing the firm's work helping clients with a range of services including trusts, tax planning and estate to generational wealth-transfer strategies. An attorney, she previously worked for Smith & Zuccarini, P.S. and has extensive experience in individual tax income planning, transfer tax planning, wills, trusts and estates, along with deep experience in the use of charitable trusts, life insurance trusts, asset protection trusts and perpetual dynasty trusts.

Briggs received her Juris Doctor of Law from University of Chicago, and her Master of Law in Taxation from New York University School of Law.

Shay Frederickson and Trenton Clark joined Parcion as two new senior client service specialists. Prior to Parcion, Frederickson was at Brighton Jones and brings more than 20 years of experience in the financial industry, working directly with clients as the initial point of contact. She is a Pacific Northwest native and attended Seattle Pacific University.

Seattle University alumnus and formerly of Coldstream Wealth Management, Clark has a wealth of experience in providing clients with exceptional service and delivering world-class client experiences by collaborating with the firm's entire client advisor teams.

Since the firm's founding in 2019, it has steadily grown to meet client needs and now totals 25 staff members from the top of the Pacific Northwest's competitive talent pool. With Parcion's increased AUM, this rate of growth demonstrates a successful approach executed by a top-tier team, helping its clients achieve their goals.

"We take our commitment to providing clients with the highest level of service possible very seriously," Cook said. "Not only are Kevin, Lindsey, Shay and Trenton a testament to that commitment, but they also strengthen our world-class client experience."

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. With headquarters in the Seattle area, 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**
Katherine Misel, Firmani + Associates
206.752.7015
katherine@firmani.com