

Financial Planning Association, San Francisco Chapter Job Posting

FIRM INFORMATION

DATE OF APPLICATION: January 15, 2019

*job postings are valid for 60 days

Firm Name: Grove Advisors LLC

Contact Person Name: Leslie Mallman

Address: 487 Bryant St, 3rd Floor, San Francisco, CA 94115
Street Suite City, State Zip

Phone Contact: _____

() _____ () _____ leslie@hellogrove.com
Work Telephone Mobile Email

Firm Website: https://hellogrove.com/

POSITION TITLE: Financial Planner

PT/FT: FT

Hours: 45

POSITION DESCRIPTION:

Help onboard new clients onto our platform, focusing on understanding their situation, goals, and objectives

Build personalized financial plans for clients using our technology platform

Walk clients through their completed plan, then stay in touch with them to answer questions and help them make concrete progress toward their goals through quarterly check-ins

Collaborate with our product team to improve the experience of clients and planners when using the technology platform

Mentor and guide junior planners (for Sr. Financial Planners)

QUALIFICATIONS:

Two or more years of experience in financial planning

Ideally a Certified Financial Planner. Series 65 or other qualification to be an investment adviser representative in California.

A passion for understanding clients needs, and working hard to give them the best service

The ability to quickly develop an excellent rapport with clients

A desire to work at an innovative early stage company

HOW TO APPLY:

https://hire.withgoogle.com/public/jobs/usegrovecom/view/P_AAAAAACAAAE6y8ug414Nq

When completed, email form to:
info@fpasf.org