

Financial Planning Association, NorCal Chapter Job Posting

Firm Information

Date of application: 2/2/2018

Firm Name: **ClearRock Capital, LLC**

Contact Person Name: **Henry Hagenbuch, Director**

Address: One Ferry Building, Suite 255, San Francisco, CA 94111

Phone: 415-501-9192

Email: hhagenbuch@clearrockcapital.com

Firm Website: www.clearrockcapital.com

Position Title: **Senior Investment Advisor**

PT/FT: FT

Hours: 9-5p

Position Description/Qualifications:

We are interested in speaking with candidates who are licensed investment advisors that have a current client book of business in excess of \$30 million. If you, the advisor, are looking for a succession plan, please contact us. If you, the advisor, have reached a point in your career where most of your time is spent servicing clients and you thus have an inability to focus on other aspects of the business (effective, in-house portfolio management, producing meaningful content, growing your business, utilizing effective marketing, etc.) please give us a call. We are an independent SEC-registered boutique investment advisor. We are head-quartered in Ketchum, Idaho, but have a satellite office in San Francisco with enough room to bring on new advisors. We build all-ETF portfolios that differ based on risk appetite and have been doing so since 2007. Firm assets exceed \$500 million, 100% fee-only.

We run an honest and simple, yet very process-oriented business. All investment advisors are part of the twice-weekly investment committee meetings. We also have dedicated business development and marketing professionals who will be at the investment advisor's disposal for growing their assets. Your clients remain your clients.

How to apply:

Please contact, **Henry Hagenbuch at 415-501-9192 or by email at hhagenbuch@clearrockcapital.com**