



hooker & holcombe



## Jonathan S. Gruber, RICP<sup>®</sup>, AAMS<sup>®</sup>

Director, Wealth Management

### Experience

Jonathan brings nearly 20 years of experience in the investment industry to his role as director, wealth management with Hooker & Holcombe Investment Advisors, Inc. (HHIA), a subsidiary of Hooker & Holcombe. He concentrates on providing investment advice and consulting to individuals as well as advising institutional clients on their retirement plans. Jonathan works closely with each client to identify and set goals and objectives, develop custom strategies and implement specific plans. His clients rely on his judgment for wealth planning, asset allocation and portfolio management. On an ongoing basis Jonathan monitors and reviews his clients' investment results and recommends strategic adjustments as needed.

Before joining HHIA in 2012, Jonathan served as a financial advisor with Financial Services Advisory, Inc., where he was responsible for managing client relationships, providing investment advice and financial planning. Prior to this, he was with Charles Schwab where he managed a large private client practice assisting clients with portfolio construction, investment analysis and financial planning.

Jonathan is a registered representative of Mid Atlantic Capital Corporation.

### Education

Jonathan earned a Bachelor of Science in Business Administration from the University of Massachusetts, Amherst, as well as a Certificate in Financial Planning from Quinnipiac University. He also holds FINRA Series 7 and 66 securities licenses.

### Professional Affiliations

Jonathan is a Retirement Income Certified Professional (RICP<sup>®</sup>), an Accredited Asset Management Specialist (AAMS<sup>®</sup>) and has completed the Accredited Investment Fiduciary (AIF<sup>®</sup>) program sponsored by Fi360.

Check the background of this investment professional on [FINRA's BrokerCheck](#)

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