



Ruthanne Fuller  
Mayor

City of Newton, Massachusetts  
Office of the Mayor

#179-22

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February 28, 2022

Honorable City Council  
Newton City Hall  
1000 Commonwealth Avenue  
Newton, MA 02459

RECEIVED  
2022 FEB 28 PM 4: 21  
CITY CLERK  
NEWTON, MA. 02459

To the Honorable City Councilors:

I am pleased to appoint Jim Griglun of 94 Bemis Street, Newton 02460 as a member of the Economic Development Commission. His term of office shall expire on December 31, 2023 and his appointment is subject to your confirmation. The Economic Development Commission members have three year terms staggered over the three year period. Mr. Griglun will be serving the term expiring December 2023.

Thank you for your attention to this matter.

Warmly,

Ruthanne Fuller  
Mayor

Application Form

Profile

Jim Griglun
First Name Middle Initial Last Name

[Redacted]
Email Address

94 Bemis St
Home Address Suite or Apt

Newton MA 02460
City State Postal Code

What Ward do you live in?

[X] Ward 2

Primary Phone Alternate Phone

SFP Wealth Sr Financial Associate
Employer Job Title

Which Boards would you like to apply for?

Economic Development Commission: Submitted

Interests & Experiences

Please tell us about yourself and why you want to serve.

Why are you interested in serving on a board or commission?

Raising a young family in Newton, I'm interested in contributing to the ongoing economic vitality of the city. I believe my background lends well to being a valuable contributor to the Economic Development Commission and helping the city move forward in a thoughtful manner. With a BA in Political Science, I spent my undergraduate years studying the interconnected relationship of city governments and economic development. My senior thesis focused on how cities attract businesses, mainly sports teams and entertainment venues, to spur economic development and to expand their tax bases. My interest in this topic has grown stronger over the years as I have become more acutely aware of how the economic decision-making of city governments impact the resident taxpayers (like me). With a Masters degree in Business Administration, I have launched a career constructing financial plans for individuals and families. I believe that building the architecture for individuals to achieve financial security and growth requires a skill set and critical thinking that would translate well to economic planning on the city level. My wife is a life-long resident of Newton and her parents have lived in the same house in Newton for 40 plus years. Our goal is to call Newton home for as long as we can so we have that desire to contribute to Newton remaining a vibrant place to live. I welcome the opportunity to discuss my interest in joining the Economic Development Commission in more detail. Sincerely, Jim Griglun

Jim Griglun Resume.pdf

Upload a Resume

**James R. Griglun, CFP®, MBA**94 Bemis Street • Newton, MA 02460 • [REDACTED]**EDUCATION****BOSTON UNIVERSITY QUESTROM SCHOOL OF MANAGEMENT**

Boston, MA

Master of Business Administration, May 2014

**UNION COLLEGE**

Schenectady, NY

Bachelor of Arts in Political Science, June 2004

**PROFESSIONAL EXPERIENCE****SFP Wealth**

Wellesley, MA

Financial planning firm with over \$1 billion assets under advisory

2017 - Present

*Senior Financial Associate*

- Managing financial adviser for approximately \$150m book of business, mainly consisting of high net worth individuals and families.
- Construct individually tailored financial planning recommendations for wealth enhancement, retirement, asset protection, tax efficiency, and charitable giving.
- Responsible for identifying business development opportunities and constructing investment and insurance proposals for presentation.
- Firm specialist for business planning clients, with focus on succession planning, retirement plan development and income tax coordination.
- Contribute to the firm's investment excellence as an active, participating member of the Investment Committee.
- Author private client quarterly newsletter along with other ad hoc marketing communications.
- Oversaw the development of SFP Wealth's client service model, which produced defined client engagement verticals and established new pricing matrix for firm's offerings.

**Kaplan Financial Services, Inc.**

Newton, MA

*Client Service Associate*

2007 - 2017

- Dedicated relationship manager for segment of firm's highest net worth clients, operating as the primary administrator for all customer service and account matters and participating in face-to-face client meetings.
- Assessed the risk and issues pertaining to pricing of potential municipal and corporate bond investments to provide investment team with daily summary of the bonds suitable for firm trading.
- Analyzed performance of the firm's 115 core mutual fund holdings to produce quarterly updates for consumption by the investment team and conduct initial fund research when alternatives are requested.
- Monitored client accounts and initiated portfolio reallocation when necessary to ensure adherence to client's desired investment objectives while maintaining required liquidity levels and compliance to firm's regulations.

**Commonwealth Financial Network**

Waltham, MA

*New Business Associate*

2005-2007

- Provided back office support for advisers in the areas of long-term care insurance, life insurance, and disability insurance.

**ADDITIONAL INFORMATION**

- CERTIFIED FINANCIAL PLANNER™ Practitioner
- FINRA Series 7 registration
- NASAA Series 63 registration
- MA Life, Accident & Health insurance licensed
- Demonstrated proficiency utilizing eMoney planning software
- Volunteer with Street Cred providing pro bono financial coaching services