



**Global Retirement Partners, LLC**  
[www.grpfinancial.com](http://www.grpfinancial.com)

**David R. Krimm CFP®**

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This brochure supplement provides information about David R. Krimm that supplements the Global Retirement Partners, LLC (“GRP”) brochure. You should have received a copy of that brochure that describes the investment advisory services offered through GRP, a registered investment advisor. Please contact David R. Krimm if you did not receive the firm’s brochure or if you have any questions about the contents of this supplement. Additional information about David R. Krimm is available on the United States Securities and Exchange Commission’s (“SEC”) website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

Registration with the SEC or any state securities authority does not imply a certain level of skill or training.

## Table of Contents

Educational Background and Business Experience .....	3
Disciplinary Information.....	4
Other Business Activities.....	4
Additional Compensation.....	4
Supervision .....	5
Requirements for State-Registered Advisors.....	5

### Educational Background and Business Experience

**Name:** David R. Krimm

**Year of Birth:** 1953

**Education:**

Yale School of Management: MBA; 1981  
 Teaching Assistant, Quantitative Analysis  
 Brown University: BA, History of Religion; 1975

**Professional Designation:**

**Certified Financial Planner™ (CFP®)**

Designation Essentials	
Status	Currently offered and recognized by the issuing organization.
Issuing Organization	Certified Financial Planner Board of Standards, Inc.
Qualification and Educational Requirements	
Prerequisites	Candidate must meet the following requirements: <ul style="list-style-type: none"> <li>A bachelor's degree (or higher) from an accredited college or university, and</li> <li>Three years of full-time personal financial planning experience or the equivalent part-time experience (2,000 hours equals one year full-time).</li> </ul>
Education Requirements	Candidate must complete a CFP-board registered program, or hold <u>one</u> of the following: <ul style="list-style-type: none"> <li>CPA</li> <li>ChFC</li> <li>Chartered Life Underwriter (CLU)</li> <li>CFA</li> <li>Ph.D. in business or economics</li> <li>Doctor of Business Administration</li> <li>Attorney's License</li> </ul>
Examination Type	Final certification examination
Continuing Education Requirements	30 hours every two years

**Business Experience:**

06/2017 to Present: Global Retirement Partners, LLC; Investment Advisor Representative  
 06/2017 to Present: Hargrave Fiduciary Advisors; Advisor  
 08/2012 to 06/2017: Consultant  
 01/2008 to 07/2012: SVB Financial Group; Head of Strategy and Research  
 02/2005 to 02/2007: The San Francisco Foundation; Director, Philanthropic Services

David R. Krimm's career has been devoted to fostering and managing innovation, working as a serial "intra-preneur" within market-leading organizations at the intersection of financial services and technology.

Most recently David was Head of Research & Development for SVB Financial Group, and created a new performance benchmarking service for the venture-backed clients of Silicon Valley Bank. Before joining SVB he was the COO for LabMorgan, a division of JPMorgan's investment bank that investigated new enterprise-relevant technologies. Prior to JPMorgan he was the Director of Marketing for Hambrecht & Quist, and the founding President of H&Q Fund Management. At Intuit he was part of the team that launched online banking services in Quicken, and was the first President of Quicken Investment Services; and at Charles Schwab he created the 401(k) business, along with the first no-transaction-fee mutual fund program. The products and businesses that he has launched have strengthened these organizations' business models, and enhanced their competitive differentiation.

Form ADV Part 2B, Item 3

### **Disciplinary Information**

David R. Krimm has no disciplinary history. Additional information about David R. Krimm is available on the Securities & Exchange Commission website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov), and at FINRA broker check at <http://www.finra.org/Investors/ToolsCalculators/BrokerCheck/>

Form ADV Part 2B, Item 4

### **Additional Compensation**

David R. Krimm does not receive economic benefits from persons other than clients in connection with providing advisory services. "Economic Benefits" includes sales awards and other prizes or any bonus that is based, at least in part, on the number or amount of sales, client referrals, or new accounts.

David R. Krimm may act as a referral agent to third party investment advisory firms and he may receive referral compensation from such an arrangement. In such case, you will be provided with disclosure about the arrangement and the compensation to be received at the time of the referral.

Form ADV Part 2B, Item 5

### **Other Business Activities**

David R. Krimm is a member of the Advisory Council for Sack Properties, a San Francisco-headquartered real estate investment firm.

### **Supervision**

Global Retirement Partners maintains a supervisory structure and system reasonably designed to prevent violations of the Investment Advisers Act of 1940. Cosmo Gould, Chief Compliance Officer or his designee is responsible for administering the GRP policies and procedures for investment advisory activities and for regularly evaluating their effectiveness. Contact (415) 526-2753 for the name and phone number of your financial advisor's immediate supervisor.

### **Requirements for State-Registered Advisers**

GRP is registered with the SEC and therefore section does not apply.