



IAPD Report

GRANT KONSTANTINOVICH TER-AVANESYAN

CRD# 5414528

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Please contact FINRA with any concerns.



IAPD Information About Representatives

IAPD offers information on all current-and many former representatives. Investors are strongly encouraged to use IAPD to check the background of representatives before deciding to conduct, or continue to conduct, business with them.

What is included in a IAPD report?

IAPD reports for individual representatives include information such as employment history, professional qualifications, disciplinary actions, criminal convictions, civil judgments and arbitration awards.

It is important to note that the information contained in an IAPD report may include pending actions or allegations that may be contested, unresolved or unproven. In the end, these actions or allegations may be resolved in favor of the representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

Where did this information come from?

The information contained in IAPD comes from the Investment Adviser Registration Depository (IARD) and FINRA's Central Registration Depository, or CRD, (see more on CRD below) and is a combination of:

- information the states require representatives and firms to submit as part of the registration and licensing process, and
- information that state regulators report regarding disciplinary actions or allegations against representatives.

How current is this information?

Generally, representatives are required to update their professional and disciplinary information in IARD within 30 days.

Need help interpreting this report?

For help understanding how to read this report, please consult NASAA's IAPD Tips page <http://www.nasaa.org/IAPD/IARReports.cfm>

What if I want to check the background of an Individual Broker or Brokerage Firm?

To check the background of an Individual Broker or Brokerage firm, you can search for the firm or individual in IAPD. If your search is successful, click on the link provided to view the available licensing and registration information in FINRA's BrokerCheck website.

Are there other resources I can use to check the background of investment professionals?

It is recommended that you learn as much as possible about an individual representative or Investment Adviser firm before deciding to work with them. Your state securities regulator can help you research individuals and certain firms doing business in your state. The contact information for state securities regulators can be found on the website of the North American Securities Administrators Association <http://www.nasaa.org>



Report Summary

GRANT KONSTANTINOVICH TER-AVANESYAN (CRD# 5414528)

The report summary provides an overview of the representative's professional background and conduct. The information contained in this report has been provided by the representative, investment adviser and/or securities firms, and/or securities regulators as part of the states' investment adviser registration and licensing process. The information contained in this report was last updated by the representative, a previous employing firm, or a securities regulator on **03/02/2026**.

CURRENT EMPLOYERS

Firm	CRD#	Registered Since
IA GRANT PRIVATE WEALTH MANAGEMENT	CRD# 292917	04/03/2018

QUALIFICATIONS

This representative is currently registered in **0** SRO(s) and **2** jurisdiction(s).

Is this representative currently Inactive or Suspended with any regulator? **No**

Note: Not all jurisdictions require IAR registration or may have an exemption from registration. Additional information including this individual's qualification examinations and professional designations is available in the Detailed Report.

REGISTRATION HISTORY

This representative was previously registered with the following firm(s):

FIRM	CRD#	LOCATION	REGISTRATION DATES
IA STRATEGIC ADVISERS, INC.	104555	WALNUT CREEK, CA	09/14/2011 - 02/21/2018
B FIDELITY BROKERAGE SERVICES LLC	7784	WALNUT CREEK, CA	11/19/2007 - 02/21/2018
IA STRATEGIC ADVISERS, INC.	104555	SALT LAKE CITY, UT	03/09/2009 - 03/05/2010

For additional registration and employment history details as reported by the individual, refer to the Registration and Employment History section of the Detailed Report.

DISCLOSURE INFORMATION

Disclosure events include certain criminal charges and convictions, formal investigations and disciplinary actions initiated by regulators, customer disputes and arbitrations, and financial disclosures such as bankruptcies and unpaid judgments or liens.

Are there events disclosed about this representative? **Yes**

The following types of events are disclosed about this representative:

Type	Count
Termination	1





Qualifications

REGISTRATIONS

This section provides the SRO, states and U.S. territories in which the representative is currently registered and licensed, the category of each registration, and the date on which the registration becomes effective. This section also provides, for each firm with which the representative is currently employed, the address of each location where the representative works. This individual is currently registered with **2** jurisdiction(s) and **0** SRO(s) through his or her employer(s).

Employment 1 of 1

Firm Name: **GRANT PRIVATE WEALTH MANAGEMENT**
Main Address: 4683 CHABOT DRIVE
SUITE 101
PLEASANTON, CA 94588
Firm ID#: 292917

	Regulator	Registration	Status	Date
	California	Investment Adviser Representative	Approved	04/03/2018
	Texas	Investment Adviser Representative	Restricted Approval	06/15/2022

Branch Office Locations

GRANT PRIVATE WEALTH MANAGEMENT
4683 CHABOT DRIVE
SUITE 101
PLEASANTON, CA 94588



Qualifications

PASSED INDUSTRY EXAMS

This section includes all industry exams that the representative has passed. Under limited circumstances, a representative may attain registration after receiving an exam waiver based on a combination of exams the representative has passed and qualifying work experience. Likewise a new exam requirement may be grandfathered based on a representative's specific qualifying work experience. Exam waivers and grandfathering are not included below.

This individual has passed 0 principal/supervisory exams, 2 general industry/product exams, and 2 state securities law exams.

Principal/Supervisory Exams

Exam	Category	Date
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No information reported.

General Industry/Product Exams

Exam	Category	Date
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Securities Industry Essentials Examination (SIE)	SIE	02/21/2018
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General Securities Representative Examination (S7)	Series 7	11/16/2007
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State Securities Law Exams

Exam	Category	Date
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Uniform Combined State Law Examination (S66)	Series 66	03/28/2009
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Uniform Securities Agent State Law Examination (S63)	Series 63	02/04/2008
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PROFESSIONAL DESIGNATIONS

This section details that the representative has reported **1** professional designation(s).

Certified Financial Planner

This representative holds or did hold **1** professional designation(s) that may have been used to qualify as an Investment Advisor representative. Please check with the appropriate designation authority for verification that the designation is still in effect. The contact information for these professional designation authorities can be found on the website for the North American Securities Administrators Association at <http://www.nasaa.org>



Registration & Employment History

PREVIOUSLY REGISTERED WITH THE FOLLOWING FIRMS

This representative held registrations with the following firms:

	Registration Dates	Firm Name	ID#	Branch Location
IA	09/14/2011 - 02/21/2018	STRATEGIC ADVISERS, INC.	CRD# 104555	WALNUT CREEK, CA
B	11/19/2007 - 02/21/2018	FIDELITY BROKERAGE SERVICES LLC	CRD# 7784	WALNUT CREEK, CA
IA	03/09/2009 - 03/05/2010	STRATEGIC ADVISERS, INC.	CRD# 104555	SALT LAKE CITY, UT

EMPLOYMENT HISTORY

Below is the representative's employment history for up to the last 10 years.

Employment Dates	Employer Name	Position	Investment Related	Employer Location
01/2026 - Present	GLAVA Family Inc.	Owner	N	Pleasanton, CA, United States
04/2022 - Present	Leo Development	Managing Member	Y	Grand Junction, CO, United States
08/2021 - Present	Glava Realty	Agent	N	Walnut Creek, CA, United States
09/2020 - Present	Grant K. Ter-Avanesyan	Consultant	Y	Dublin, CA, United States
03/2018 - Present	GRANT PRIVATE WEALTH MANAGEMENT, INC.	CFO/INVESTMENT ADVISOR REPRESENTATIVE	Y	Pleasanton, CA, United States
02/2018 - Present	Grant K. Ter-Avanesyan	Insurance Agent	Y	Dublin, CA, United States
11/2017 - Present	IHSS In Home Supportive Services	Owner	N	Walnut Creek, CA, United States
03/2017 - 09/2023	Grant K. Ter-Avanesyan Properties	Owner/Landlord	N	Dublin, CA, United States
07/2007 - 02/2018	FIDELITY BROKERAGE SERVICES. LLC	FINANCIAL REPRESENTATIVE	Y	SALT LAKE CITY, UT, United States
07/2007 - 02/2018	STRATEGIC ADVISERS INC.	Investment Advisor Representative	Y	SALT LAKE CITY, UT, United States



Registration & Employment History



OTHER BUSINESS ACTIVITIES

This section includes information, if any, as provided by the representative regarding other business activities the representative is currently engaged in either as a proprietor, partner, officer, director, employee, trustee, agent, or otherwise. This section does not include non-investment related activity that is exclusively charitable, civic, religious, or fraternal and is recognized as tax exempt.

Name: IHSS In Home Supportive Services

Address: Walnut Creek, CA

Nature of Business: Medical and health care

Investment Related: N

Title: Provider

Duties: Helping to get to medical appointments, Prepare meals, routine laundry, shopping for food, hygiene

Start Date: 11/02/2017

Total Hours p/m:40

Sec Trading Hours p/m:0

Name: Oli Insurance Services, Inc.

Investment Related: Yes

Address Pleasanton, CA

What is the nature of the other business? Referral for client Insurance needs (Property and Casualty, Annuity, Life insurance)

Your position, title, or relationship. Individual referring client for quotes

Start date of your relationship (mm/year) 10/2018

Approximate hours a month spent on the other business 15 hours

Approximate hours during trading spent on the other business 2 Hours

Approximate percentage of time and income related to the business. 10%

Duties: When clients are looking to P&C insurance quotes or other insurance needs, I will refer them through the system to Oli Insurance who will do the quotes and search for their insurance needs. I will get paid referral fee

Name: Grant Ter-Avanesyan

Address: Dublin, CA

Nature of Business: Referrals

Investment Related: Y

Title: n/a

Duties: provide referrals to other professionals

Start Date: 09/2020

Total Hours p/m:5

Sec Trading Hours p/m:0

Name: Glava Realty

Investment Related: No

Address Dublin, CA

What is the nature of the other business? Rental Property

Your position, title, or relationship: Agent

Start date of your relationship (mm/year): 08/2021

Approximate hours a month spent on the other business: 1

Approximate hours during trading spent on the other business: 0

Approximate percentage of time and income related to the business: 3%

Duties: Holding LLC for rental properties, possible in the future ARBNB rentals property management

Name: Leo Development

Investment-related? (yes/no) Real estate Investment

Address: 2454 Patterson Road, Suite 200, Grand Junction, Colorado

What is the nature of the other business?: Real Estate Development

Your position, title, or relationship.: Managing Member

Start date of your relationship (mm/year): 04/2022



Registration & Employment History



OTHER BUSINESS ACTIVITIES

Approximate hours a month spent on the other business: 8 hours
Approximate hours during trading spent on the other business:0 hours
Approximate percentage of time and income related to the business.: 5%
Briefly describe your duties relating to the other business. Acquire land, develop the plans, sell the land

Name: GLAVA Family Inc.
Investment-related? (yes/no) No
Address: Pleasanton, CA
What is the nature of the other business?: Holding company
Your position, title, or relationship.: owner
Start date of your relationship (mm/year): 01/2026
Approximate hours a month spent on the other business: 8 hours
Approximate hours during trading spent on the other business:0 hours
Approximate percentage of time and income related to the business.: 5%
Briefly describe your duties relating to the other business. holding company that owns a company which provides tax services.



Disclosure Summary

Disclosure Information

What you should know about reported disclosure events:

(1) Certain thresholds must be met before an event is reported to IARD, for example:

- A law enforcement agency must file formal charges before an Investment Adviser Representative is required to report a particular criminal event.;
- A customer dispute must involve allegations that an Investment Adviser Representative engaged in activity that violates certain rules or conduct governing the industry and that the activity resulted in damages of at least \$5,000.

(2) Disclosure events in IAPD reports come from different sources:

As mentioned in the "About IAPD" section on page 1 of this report, information contained in IAPD comes from Investment Adviser Representatives, firms and regulators. When more than one of these sources reports information for the same disclosure event, all versions of the event will appear in the IAPD report. The different versions will be separated by a solid line with the reporting source labeled.

(3) There are different statuses and dispositions for disclosure events:

- A disclosure event may have a status of *pending*, *on appeal*, or *final*.
 - A "pending" disclosure event involves allegations that have not been proven or formally adjudicated.
 - A disclosure event that is "on appeal" involves allegations that have been adjudicated but are currently being appealed.
 - A "final" disclosure event has been concluded and its resolution is not subject to change.
- A final disclosure event generally has a disposition of *adjudicated*, *settled* or *otherwise resolved*.
 - An "adjudicated" matter includes a disposition by (1) a court of law in a criminal or civil matter, or (2) an administrative panel in an action brought by a regulator that is contested by the party charged with some alleged wrongdoing.
 - A "settled" matter generally represents a disposition wherein the parties involved in a dispute reach an agreement to resolve the matter. Please note that Investment Adviser Representatives and firms may choose to settle customer disputes or regulatory matters for business or other reasons.
 - A "resolved" matter usually includes a disposition wherein no payment is made to the customer or there is no finding of wrongdoing on the part of the Investment Adviser Representative. Such matters generally involve customer disputes.

(4) You may wish to contact the Investment Adviser Representatives to obtain further information regarding any of the disclosure events contained in this IAPD report.



DISCLOSURE EVENT DETAILS

When evaluating this information, please keep in mind that some items may involve pending actions or allegations that may be contested and have not been resolved or proven. The event may, in the end, be withdrawn, dismissed, resolved in favor of the Investment Adviser Representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

This report provides the information exactly as it was reported to the Investment Adviser Registration Depository. Some of the specific data fields contained in the report may be blank if the information was not provided.

The following types of events are disclosed about this representative:

Type	Count
Termination	1

Termination

This disclosure event involves a situation where the Investment Adviser Representative voluntarily resigned, was discharged or was permitted to resign after allegations were made that accused the Investment Adviser Representative of violating investment-related statutes, regulations, rules or industry standards of conduct; fraud or the wrongful taking of property; or failure to supervise in connection with investment-related statutes, regulations, rules or industry standards of conduct.

Disclosure 1 of 1

Reporting Source: Firm

Firm Name: FIDELITY INVESTMENTS

Termination Type: Voluntary Resignation

Termination Date: 01/24/2018

Allegations: Allegation regarding whether employee was inappropriately paid under the firm's computer equipment purchase assistance program and submitted altered receipts and was inappropriately paid under the firm's fitness reimbursement program. Not customer or sales practice related.

Product Type: No Product

Reporting Source: Individual

Firm Name: FIDELITY INVESTMENTS

Termination Type: Voluntary Resignation

Termination Date: 01/24/2018

Allegations: ALLEGATION REGARDING WHETHER OR NOT THE EMPLOYEE WAS INAPPROPRIATELY PAID UNDER THE FIRM'S COMPUTER EQUIPMENT PURCHASE ASSISTANCE PROGRAM. ALLEGATION REGARDING WHETHER OR NOT THE EMPLOYEE SUBMITTED ALTERED RECEIPTS AND WHETHER OR NOT EMPLOYEE MAY HAVE BEEN INAPPROPRIATELY PAID UNDER THE FIRM'S FITNESS REIMBURSEMENT PROGRAM. THIS IS NOT CUSTOMER OR SALES PRACTICE RELATED.

Product Type: No Product



End of Report

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