



07.16.25 | FIRM ANNOUNCEMENTS

Grimes and Company Welcomes Harmony Wealth Management's Matt Morse and Tom Dunlap

As we continuously strive to deliver the best possible financial guidance, investment management, and overall client experience, we are always looking for new opportunities to add resources and top talent to our team. With that in mind, we are thrilled to welcome Harmony Wealth Management's Matt Morse and Tom Dunlap to Grimes and Company, along with their valued clients.

In joining Grimes, Matt will lead our investment team's equity strategy offerings as Chief Equity Strategist. As a CFA Charterholder and manager of three individual stock strategies, he brings a proven track record of strong performance to this role. Matt's impressive background of 25 years of experience includes serving as Chief Investment Officer of Eaton Vance's \$10B wealth management division, where he was also a voting member of their Asset Allocation Committee and had a leadership role in the Institutional Equity Department. He also served as Chief Equity Strategist for Clarendon Private LLC, Director of Investments at Crestwood Advisors LLC, and Analyst at Capital Research (American Funds).

Tom, also a CFA Charterholder, will join our Investment and Portfolio Operations Team, bringing significant industry experience that ranges from an Analyst role at Loomis Sayles and Wilshire Associates to working with Matt at Harmony Wealth on investment portfolios, client relationships and running day-to-day operations.

"The Harmony team shares our values of putting clients above all, teamwork, and constantly improving every day," said Grimes and Company's CEO and Chief Investment Officer Kevin Grimes. "Matt and Tom bring additional experience and incredible expertise to our ranks, and we are happy to welcome them aboard."

To our clients, we look forward to having Matt and Tom put their deep and proven investment acumen and years of experience to work for you. And for Harmony Wealth's clients, we are grateful for the opportunity to provide our unparalleled service and support.