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Grimes & Company Featured in Barron's Profile and 2025 Top Advisor Rankings Please See Important Disclosure Information regarding rankings/recognitions

We are very proud to share that Barron's profiled Grimes & Company CEO Kevin Grimes in a feature article within its annual Top Financial Advisors issue. In that same issue, Grimes & Company was also recognized again as one of the top independent advisory firms in the country. The article, "How One Family Firm Is Balancing Growth and Independence," offers perspective from Kevin on the history of our firm, plans for strategic growth (including our recently announced partnership with Rise Growth Partners), priorities moving forward, and much more. Congratulations to the entire team for the industry recognition and acknowledgment of everything done to set the firm apart. As Kevin put it when asked in the profile what differentiates Grimes and Company within what is an admittedly crowded space: "I would put our firm up against the best planning firms, and I certainly would put us up against the best asset management firms in the space. We have both sides of the house built out and, along with all the resources we have, I think we're a compelling place for clients to consider."

You can read this interview with Kevin in its entirety **here.**

Important Disclosures:

Please Note: Limitations. Neither rankings nor recognitions by unaffiliated rating services, publications, media, or other organizations, nor the achievement of any professional designation, certification, degree, or license, membership in any professional organization, or any amount of prior experience or success, should be construed by a client or prospective client as a guarantee that the client will experience a certain level of results if the investment professional or the

investment professional's firm is engaged, or continues to be engaged, to provide investment advisory services. The ranking is based upon specific criteria and methodology (ranking criteria/methodology). No ranking or recognition should be construed as an endorsement by any past or current client of the investment professional or the investment professional's firm.

Kevin Grimes received the Barron's Magazine Top 100 Independent Advisors Award on September 11, 2025 for the time period from July 1, 2024 to June 30, 2025.

Advisors seeking to be ranked must first complete a prequalification process designed to ensure that participating advisors are experienced and sophisticated. Advisors who meet the criteria then complete a survey about their practices. Barron's verifies the data with the advisors' firms and with regulatory databases and then we apply our rankings formula to the data to generate a ranking. The formula features three major categories of calculations: (1) assets (2) revenue (3) quality of practice. In each of those categories Barron's performs multiple sub-calculations. Qualitative factors considered include advisor's experience, their advanced degrees and industry designations, their charitable and philanthropic work, and their compliance records.

No portion of ratings by Barron's should be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results or satisfaction if Grimes & Company, or Kevin Grimes are engaged, or continue to be engaged, to provide investment advisory services. Neither Kevin Grimes nor Grimes & Company paid a fee to be considered for this ranking. Grimes & Company paid a fee after the ranking was announced for article reprints.