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# Grimes & Company Featured in USA Today's Top Financial Advisory Firms of 2026

Please See Important Disclosure Information regarding rankings/recognitions

Today, we're pleased to share that Grimes & Company has been recognized within USA Today's Top Financial Advisory Firms of 2026 rankings. Now in its fourth year, these rankings were conducted in partnership with market research firm Statista, with more details on the overall methodology and criteria listed out immediately below. Thank you to our clients and colleagues for this recognition.

Grimes & Company Wealth Management, LLC ("Grimes & Company") was named to the *USA TODAY Best Financial Advisory Firms 2026* list, developed by Statista. The ranking recognized 1,000 U.S. advisory firms and was based on: (i) recommendations from clients, industry experts, and financial advisors, and (ii) growth in assets under management ('AUM'). Statista indicates that recommendation data were collected through an independent survey of more than 30,000 individuals, with recommendations weighted at 20% of the final score and AUM development weighted at 80%. Eligibility criteria included, among other things, registration as an investment advisory firm with the SEC and/or at the state level for at least one year, a principal office in the United States, a clean disciplinary record, provision of financial planning or portfolio management services to individuals and/or small businesses, and more than $500,000 in AUM. According to the published methodology, AUM development was measured using data collected through January 2026, and events before or after February 11, 2026 were not included in the metrics. Grimes & Company did not pay a fee to participate in the survey process. This recognition should not be construed as a guarantee of future investment results or performance, and it should not be considered as the sole factor in selecting an investment adviser. Not all advisers were included, and advisory experiences may differ.

View the full rankings here.

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Grimes & Company was named to the USA TODAY Best Financial Advisory Firms 2026 list, developed by Statista on April 14, 2026. The ranking recognized 1,000 U.S. advisory firms and was based on: (i) recommendations from clients, industry experts, and financial advisors, and (ii) growth in assets under management ('AUM'). Statista indicates that recommendation data were collected through an independent survey of more than 30,000 individuals, with recommendations weighted at 20% of the final score and AUM development weighted at 80%. Eligibility criteria included, among other things, registration as an investment advisory firm with the SEC and/or at the state level for at least one year, a principal office in the United States, a clean disciplinary record, provision of financial planning or

portfolio management services to individuals and/or small businesses, and more than $500,000 in AUM. According to the published methodology, AUM development was measured using data collected through January 2026, and events before or after February 11, 2026 were not included in the metrics. The recognition should not 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 is engaged, or continues to be engaged, to provide investment advisory services. Grimes & Company did not pay a fee to participate in the survey process or for advertisement materials after the ranking was announced.