



Adam Clark

FINANCIAL ADVISOR

aclark@grimesco.com

(508) 986-9978

Adam collaborates with clients to create financial plans and portfolios that aim to meet their needs and objectives, while minimizing risk where possible. He enjoys building a personal relationship with clients and their families, planning with them for today, as well as generations to come.

Adam joined Grimes and Company in 2018. He graduated Magna Cum Laude with a Bachelor's Degree in Organizational Leadership from Texas A&M. Prior to joining Grimes, Adam had worked for several of the largest brokerage firms in the country. At TD Ameritrade, he worked as a Senior Financial Consultant where he developed comprehensive financial plans for high-net-worth individuals. In his role as a Private Client Advisor for JP Morgan Chase, he was responsible for running financial analysis and strategy implementation for Chase Private clients.

When he's not working with his clients, Adam focuses his energy on his wife and three children. He and his family are actively involved in their church, where Adam serves as an elder. Together, he and his family run their 14-acre homestead farm and enjoy raising sheep, goats and chickens.

Please Note: Limitations. Neither 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 he/she will experience a certain level of results if Grimes is engaged, or continues to be engaged, to provide investment advisory services.

Please Note: Limitations. The scope of any financial planning and consulting services to be provided depends upon the terms of the engagement, and the specific requests and needs of the client. Grimes does not serve as an attorney, accountant, or insurance agent. Grimes does not prepare legal documents or tax returns, nor does it sell insurance products. If the client desires, one of Grimes' representatives, in their separate licensed individual capacities, can be engaged to provide insurance sales/services as described on Grimes' written disclosure Brochure (a copy of which is linked to this website) per the terms and conditions of a separate engagement and fee.

RELATED SERVICES

Financial Planning