



Adam R. Jacobs, CFA, CFP® VICE PRESIDENT

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Adam leads a team of our skilled Wealth and Client Service Managers that have stretched the firm's client base across the country. Adam sits on both the Investment Council and Executive Council to work on strategic initiatives across the firm.

Adam's interactions with Grimes date back to the early 2000's when Adam was a Fixed Income trader at State Street Global Advisors. He later utilized Grimes' investment management resources while he owned an independent firm providing personal wealth management services, and he joined Grimes & Company in 2010. Adam graduated with a BS degree in Finance & Investments Babson College. Adam is a CFA Charterholder and CFP®. He is a member of the CFA Institute and Boston Security Analysts Society.

When he's not working, Adam loves to spend time with his wife and two children. He enjoys outdoor activities, sports and the humbling experience of golf.

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