



## Benjamin B. Wallace, CFA

PORTFOLIO MANAGER, RESEARCH DIRECTOR

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Benjamin B. Wallace spearheads the Grimes & Company research process. As the lead Portfolio Manager for the Core Equity and Dividend Growth strategies, he is primarily responsible for individual stock research.

As Research Director, he oversees the Macro Economic Strategic Allocation (MESA) process to set portfolio allocations based on economic modeling, and authors the *Grimes Investment Quarterly* (*Grimes IQ*) and *Outlook*, which summarize market and economic developments and their portfolio implications. Finally, he leads the weekly Investment Committee meeting.

Ben graduated from Franklin & Marshall College with a BA in Economics and a concentration in Finance. Prior to joining Grimes & Company in January 2001, he worked as a Securities Analyst for another Registered Investment Advisory Firm. Ben is a CFA® charterholder and an active member of The Boston Security Analysts Society (BSAS).

Ben and his wife, Amy, have been residents of Westborough since 2006. He takes advantage of the saved commuting time by coaching his two children in soccer, rugby, football, and basketball. He is also the Treasurer for the Westborough Education Technology Fund, a 501c3 non-profit established to support the responsible use of technology in the Westborough Public Schools. Combining athletics and book keeping, he is treasurer of (and occasional player for) the Mystic River Rugby Club, the 2016 and 2018 Men's Division 1 National Champions. In his spare time, Ben enjoys training for, and running in, obstacle course races such as the Spartan Race and Tough Mudder, having completed over a dozen in the past five years.

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