David R. Roberts, CFP®

FINANCIAL ADVISOR

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David brings his 25 years of industry experience to each client relationship. He strives to provide clients with clarity and confidence throughout each of their different stages of life, using a personalized financial plan, disciplined investment management, and outstanding client support.

David is a CFP® (CERTIFIED FINANCIAL PLANNER™), and he graduated from Connecticut College with a BA in Economics. He began his career in financial services with Legg Mason in Boston before moving to Florida and starting a 20 plus year career with TDAmeritrade. At TDAmeritrade, he was an Investment Consultant helping clients with retirement planning and investment management. David held branch leadership roles in Atlanta and Omaha before moving back to Sarasota, FL, where he resides with his family and three dogs.

David and his wife, Jennifer, have two children. In their free time, they are usually on a field watching lacrosse or walking around Walt Disney World. Outside of family fun, he enjoys competing in local area Crossfit® events.

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. Firm Representatives may, however, separately provide insurance products and services through our affiliate, Grimes Wealth Protection Group, LLC. If the client desires, one of Grimes' representatives, acting in their capacity as a representative of Grimes Wealth Protection Group, LLC or 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.