



## Emily Grimes Wood, CFP<sup>®</sup>, CRPS

PRINCIPAL, VICE PRESIDENT

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As a Wealth Manager, Emily most enjoys working with clients to help them establish and meet their goals by providing ongoing advice and investment management.

She finds her client relationships to be incredibly rewarding. She leads the Grimes & Company Financial Planning Council and also sits on the Investment Council and the Executive Management Team.

Emily graduated from Villanova University with a BS in Business Management and a minor in English. Prior to joining Grimes & Company in 2002, Emily worked as a consultant at Accenture and a Financial Advisor at UBS in Boston.

Emily earned her CFP<sup>®</sup> designation in 2004 and is also a Chartered Retirement Plans Specialist (CRPS<sup>®</sup>). She is an active member of the Financial Planning Association (FPA) and the Boston Estate Planning Council (BEPC).

Emily serves on the Investment Committee of the New England Botanical Garden at Tower Hill, where she is also a Trustee. She sits on the Investment Committee of the Worcester Art Museum and is also a Museum Corporator. Emily is a member of the Steering Committee for the McNulty Institute for Women's Leadership at Villanova University.

She lives in Sudbury with her husband, two children and dog. When she is not working, she enjoys traveling with her family and watching her kids play sports. She has been the past PTO Treasurer and enjoys volunteer work, especially the Nantucket Food Pantry.

**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

### RELATED SERVICES

Financial Planning

Institutional

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.