



Gerald S. Connolly, CFP[®]

VICE PRESIDENT

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When Grimes & Company became an independent advisory firm in 1999, Jerry was appointed Vice President with his primary role continuing to be working with clients and their investing and financial planning objectives.

Jerry served as Chief Compliance Officer where he implemented and enforced a process driven culture for the firm before training Michael Davide to succeed him in 2016. Now Jerry devotes his full attention to working with clients, many of whom are now approaching or already in retirement. He particularly enjoys helping clients during the transition years as they begin the process of leaving their working days behind and prepare for an entirely new chapter in their lives. Jerry is a CERTIFIED FINANCIAL PLANNER™ and an active member of The Financial Planning Association of Massachusetts.

Jerry has been in the financial services industry since graduating from Northeastern University in 1973 with a BS degree in Business Administration. After working with the Paul Revere Companies after graduation, he moved on to join Grimes Financial Group in 1986, where he began his rewarding career in assisting clients with achieving their goals and objectives leading toward their eventual retirement years.

When not working with clients, he enjoys spending time with his wife, Veronica, vacationing in the state of Maine. Jerry and his wife are also active competitive ballroom dancers and enjoy participating in various competitive events around the country.

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

RELATED SERVICES

Financial Planning

(a copy of which is linked to this website) per the terms and conditions of a separate engagement and fee.