



## Janelle L. Coulman, CFP<sup>®</sup>

FINANCIAL ADVISOR

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As a dedicated Financial Advisor, Janelle aims to provide her clients with comprehensive financial planning and customized investment management services.

Using knowledge and empathy, and drawing extensive experience in the industry, she strives to serve as a guide, enabling clients to make prudent, well-informed decisions about their financial future. Janelle takes great pride in the services she provides, and deeply values the trust and relationships she builds with her clients.

Janelle joined the Grimes & Company team in 2014. After obtaining a Bachelor of Science degree in Finance from Bentley University, she joined David Witherbee & Associates, Inc., a Registered Investment Advisory firm, in 2004. There, she spent ten years fostering her passion for personal finance, having the opportunity to learn the industry and develop strong relationships with clients and colleagues. In 2010, she earned the CERTIFIED FINANCIAL PLANNER™ designation, further enhancing her advisory skills and emphasizing the fiduciary standard. She is a member of the Grimes & Company Financial Planning Council, whose shared goal is to stay on top of the ever-changing financial planning landscape, and to accordingly provide timely updates and advice to clients.

Outside of the office, Janelle relishes time spent with her family and friends. She is a north shore native, and her husband is from Vermont. They now call Littleton MA home, where their two young sons keep them busy and well-entertained.

**Please Note: Limitations.** The achievement of any professional designation, certification, degree, or license should not be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results or satisfaction if Grimes is engaged, or continues to be engaged, to provide investment advisory services.

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, 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 web site) per the terms and conditions of a separate engagement and fee.

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**Financial Planning**

