GRIMES AND COMPANY

grimesco.com

Janelle L. Coulman, CFP®

FINANCIAL ADVISOR

janelle@grimesco.com
(508) 986-9975

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.

RELATED SERVICES

Financial Planning

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.