GRIMES AND COMPANY

grimesco.com

Jay Barrett, CFP®, AIF®

FINANCIAL ADVISOR

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Jay enjoys helping clients take the least amount of risk necessary in their investment accounts in order to achieve the goals in their financial plan. He customizes portfolios so that clients feel confident trusting their assets with our firm for years to come.

Jay graduated from Assumption University with a BA in Economics with a business concentration as well as dual minors in Finance and Management. He received his MBA in Economics and Financial Markets from Bentley University. While pursuing his MBA, Jay worked at Lexington Wealth Management. Prior to joining Grimes & Company in 2015, he worked for Financial Foundations Inc. Jay is a CFP® (CERTIFIED FINANCIAL PLANNER™) and an AIF® (Accredited Investment Fiduciary®). He serves on the Board of Directors for Bay Shore Yacht Club in Meredith, NH.

In his free time, Jay enjoys hiking and camping. Thru-hiking the Appalachian Trail from Georgia to Maine is on his bucket list.

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.