Jennifer A. Moran, CFP®, AEP®

FINANCIAL ADVISOR

jmoran@grimesco.com
(508) 986-9976

Jennifer enjoys working with clients and their families to meet their individual goals by providing objective financial planning advice and customized investment management strategies.

Jennifer joined Grimes & Company in 2014 following a nine year career in financial planning and investment management at Daintree Advisors, LLC and Wells Fargo Family Wealth (formerly Calibre Advisory Services, Inc.). Jennifer holds a Masters degree in Financial Planning from Bentley University and graduated magna cum laude from Syracuse University with dual Bachelor of Science degrees in Finance and Marketing. Jennifer earned the CFP® (CERTIFIED FINANCIAL PLANNER™) designation in 2011 and the AEP® Accredited Estate Planner designation in 2014.

Jennifer is an active member of The Financial Planning Association of Massachusetts, previously serving as the Director of Career Development and engages in pro bono efforts, including assisting Dana Farber patients with financial planning strategies. She is also an active member of the Boston Estate Planning Council, having served on the Women's Initiative Committee in past years. Jennifer is a mentor in the CFP Board's WIN-to-WIN program which is aimed at helping women interested in obtaining the CFP® certification. She is also a Volunteer Presenter with the Alzheimer's Association, holding seminars on Legal and Financial Planning for families dealing with Alzheimer's Disease.

Jennifer enjoys working with clients and their families to meet their individual goals by providing objective financial planning advice and customized investment management strategies. Jennifer sits on the Grimes & Company Financial Planning Council and enjoys keeping up with the ever-changing landscape of financial planning techniques.

Jennifer and her husband, Tim, have three young sons who keep them very busy. Jennifer is an avid traveler who enjoys being outdoors whenever possible.

RELATED SERVICES

Financial Planning

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