



## Joseph Hodgkins

FINANCIAL ADVISOR

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### Joe enjoys working with clients to help them develop and enact a course of action to meet their long-term financial goals.

Joe joined Grimes & Company in 2024 after being a longtime client since 2007. He had an extensive 32 years in the institutional asset management industry, helping financial advisors customize client portfolios. Joe began his career with Columbia Investments as a Regional Director in Boston, MA before joining Highland Capital, LLC in North Dallas, Texas. A career move took him to Ivy Investments in Overland Park, KS as a Senior VP, and subsequently Macquarie Asset Management as a Regional Director.

Joe and his wife Mimi have two grown children. When not helping clients, Joe enjoys spending time with his family, playing hockey, fishing, and trying to replicate his Korean mother's kimchee recipe.

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**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.

