GRIMES AND COMPANY

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Justin C. Davis, CFP®

FINANCIAL ADVISOR

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With two decades of experience in financial services, Justin believes the best financial advice begins with listening. By taking the time to understand what matters most to each client, he helps bring clarity to complex financial decisions and gives clients greater confidence in their path forward.

For Justin, financial planning is about much more than investments. It's about understanding where clients want to go, what they want the next chapter of their lives to look like, and helping them put the pieces in place to get there. Whether they are preparing for retirement, already enjoying it, or navigating a major life transition, Justin helps clients build a clear plan around the life they want to live.

Justin has built his career around developing meaningful, long-term relationships with his clients and helping them make confident financial decisions. He began his career with Fidelity Investments in 2007, where he helped clients navigate their retirement and investment needs. He later spent more than eight years as a Senior Financial Consultant with TD Ameritrade in Southlake, Texas, working closely with clients to plan for retirement, manage their investments, and make the most of the wealth they had worked hard to build.

Before joining Grimes & Company in 2019, Justin served as a Private Client Advisor with JPMorgan Chase, advising individuals and families with more complex investment and planning needs.

Justin graduated Summa Cum Laude from Texas A&M University with a bachelor's degree in Organizational Leadership and is a CERTIFIED FINANCIAL PLANNER™ professional.

Outside of work, Justin's greatest priorities are his family and faith. He met his wife, Jasmin, at church in 2007, and together they have three daughters who keep life busy and fun. Justin enjoys reading and is actively involved in youth ministry at his church in Southlake, Texas, where he mentors students and serves as the worship leader. Music is a big part of the Davis household, and he

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especially enjoys teaching his daughters to play guitar, ukulele, and mandolin.

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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. 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.