GRIMES AND COMPANY

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Karen Kelly, CFP®, RICP®

FINANCIAL ADVISOR

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With an emphasis on making finance simple and understandable, Karen helps empower her clients to make better decisions with their money.

Successfully starting your 'next chapter' requires a plan. Karen understands the needs of clients trying to figure out how to navigate change – especially those approaching retirement and those already in it. She provides the guidance clients need to help them envision the life they want to live and organize their resources to make that happen.

Karen ran a consulting practice for 18 years and prior to that helped launch Sail America – the sailing industry's first national trade association. She led the multimillion-dollar association for many years as its Executive Director.

She graduated from Boston College with BS degree in Business Management and a concentration in Accounting. She holds the CERTIFIED FINANCIAL PLANNER™ designation and is an active volunteer with the Alzheimer's Association and the Massachusetts Financial Planning Association. Karen is a presenter for Women's Money Matters and is an active supporter of WISER (Women's Institute for a Secure Retirement).

Karen and her husband are empty nesters, with two grown children living in the Boston area. Karen is an avid tennis player who has recently started playing pickle ball. She's been in book groups for 30 years and loves a good read!

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.