GRIMES AND COMPANY

grimesco.com

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

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.