



Kevin T. Grimes, CFA, CFP[®]

CEO | CHIEF INVESTMENT OFFICER

kevin@grimesco.com
(508) 366-3883

As CEO and Chief Investment Officer, Kevin wears many hats at the firm with roles that include leading the Investment Team and Investment Council, sitting on the Financial Planning Council, Management Team, and Executive Council, as well as serving clients of the firm.

Kevin is Co-Portfolio Manager on all of the firm's tactical investment strategies and serves as Advisor to the Core Equity and Core Dividend individual stock strategies.

Prior to joining Grimes & Company in 1998, Kevin was an Equity Trader at a large independent brokerage in Boston. He graduated from Babson College, where he volunteers and mentors regularly and sits on the Babson endowment Investment Committee. As an industry leader he sits on Fidelity Investments' RIA Leaders Committee as well as the Advisory Panel for Charles Schwab Institutional. He has earned the Chartered Financial Analyst (CFA[®]) and Certified Financial Planner[™] designations. Kevin previously sat on the Board of Directors of the Red Cross of Massachusetts and is a member of The Boston Security Analysts Society (BSAS).

When not working Kevin most likely can be found playing golf or skiing with one of his three children, depending on the season, or otherwise spending as much time with his family as possible.

RELATED SERVICES

Financial Planning

Institutional

Investment Management

Please Note: Limitations. Neither rankings and/or recognitions by unaffiliated rating services, publications, media, or other organizations, nor 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. Rankings published by magazines, and others, generally base their selections exclusively on information prepared and/or submitted by the recognized adviser. Rankings are generally limited to participating advisers (see participation criteria/methodology). Unless expressly indicated to the contrary, Grimes did not pay a fee to be included on any such ranking. No ranking or recognition should be construed as a current or past endorsement of Grimes by any of its clients.

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, 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 web site) per the terms and conditions of a separate engagement and fee.