



Kevin T. Grimes, CFA, CFP[®]

PRESIDENT, CHIEF INVESTMENT OFFICER

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As President 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 *magna cum laude* from Babson College, is a CFA Charterholder[™] and CFP[®] practitioner (CERTIFIED FINANCIAL PLANNER[™]).

Kevin sits on the boards of several nonprofit organizations and is a member of The Boston Security Analysts Society (BSAS). From 2017 to present, *Barron's Magazine* recognized him as one of the "Top 100 Independent Financial Advisors" in the country.

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.

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