GRIMES AND COMPANY

grimesco.com



Matt Morse, CFA

CHIEF INVESTMENT OFFICER

mmorse@grimesco.com
508-366-3883

As Chief Investment Officer, Matt leads the Investment Team and oversees the firm's equity strategies and private investments. He also works closely with clients to build meaningful relationships and help them achieve their financial goals.

Matt has 25 years of investment management experience and began his investment career at Capital Research (American Funds) where he honed his investment philosophy and process while working with exceptional investors and mentors, including Bob Kirby.

Prior to Grimes, Matt served in a variety of investment leadership roles including Chief Investment Officer of Eaton Vance's $10 billion wealth management division, member of Eaton Vance's Asset Allocation Committee, Chief Investment Officer of Harmony Wealth partners LLC, Chief Equity Strategist of Clarendon Private LLC, and Director of Investments at Crestwood Advisors LLC. He began his career at PricewaterhouseCoopers as a senior accountant and passed the uniform CPA exam.

Matt graduated from the University of Southern California. He is a CFA Charterholder, and a member of the CFA Institute. He and his wife live in Wellesley and love spending time with their two young children, Matt's mom, and their friends. Matt and Michelle are active supporters of Make-A-Wish Foundation, Shooting Touch, and Wounded Warrior Project.

Please Note: Limitations. The achievement of any professional designation, certification, degree, or license, recognition by publications, media, or other organizations, membership in any professional organization, or any amount of prior experience or success, should not be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results or satisfaction if Grimes is engaged, or continues to be engaged, to provide investment advisory services.

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