



Sam Clegg

REGIONAL DIRECTOR

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Sam Clegg serves as a Regional Director at Grimes & Company, where he works to develop deep relationships with financial consultants at Fidelity and Schwab. In this role, he focuses on building trust in the Grimes experience and communicating the firm's value to partners, helping to generate and facilitate new referrals to the firm. Sam was drawn to Grimes by its family-oriented culture, where colleagues support one another and share a commitment to making the firm the best it can be.

Sam attended St. Lawrence University in upstate New York. He began his career in the tech industry before transitioning into financial services, motivated by a desire to build meaningful relationships and help individuals secure their financial future. He joined Grimes & Company in 2025.

Outside of the office, Sam enjoys golfing, traveling, and spending time with friends

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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. 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 website) per the terms and conditions of a separate engagement and fee.