



## Sean Donovan, CFP®

FINANCIAL ADVISOR

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Sean enjoys working with his clients to create portfolios and plans aimed at achieving their unique financial goals.

Sean joined Grimes in 2024, after almost a decade of experience at UBS, BNY Mellon, and most recently Fiduciary Trust Company. In these roles, Sean was responsible for investment research, trading, and working in all aspects of client service. He is a graduate of Providence College with a BS in Finance, and he also earned the CFP® (CERTIFIED FINANCIAL PLANNER™) designation in 2024.

Outside of work, Sean enjoys golfing, reading, and is a diehard Boston sports fan. He resides in Dorchester, MA with his wife Renee and their dogs.

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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.