GRIMES AND COMPANY

grimesco.com

Todd A. Herman, CFP®

FINANCIAL ADVISOR | FINANCIAL PLANNING SPECIALIST

therman@grimesco.com
(508) 244-4768

As the Lead of the Financial Planning Committee, Todd plays a key role in setting firm standards and writing documentation for internal financial planning practices. In addition, Todd leads firm-wide financial planning education initiatives, ensuring the team stays current with the latest trends and industry developments.

With over a decade of experience as both an engineer and a financial services professional, Todd specializes in transforming complex situations into clearly defined, goal-based financial plans. He takes pride in building strong relationships with a diverse group of clients, offering them clarity, confidence, discipline, and support to achieve their long-term financial goals.

Todd holds a BS in Mechanical Engineering with a minor in Mathematics from Union College. He began his career as an engineer, designing casinos and hotels across the U.S., before earning his MBA with a concentration in Corporate Finance from the Carroll School of Management at Boston College. After transitioning to financial services, Todd quickly became a CFP® (CERTIFIED FINANCIAL PLANNER™) and has since provided guidance to high-net-worth individuals who require highly customized financial strategies.

Todd and his wife Priscilla, whom he met while competing on the Union College Swimming and Diving Team, have an energetic daughter and son. Together, they enjoy skiing, hiking, gardening, cooking, and swimming.

RELATED SERVICES

Financial Planning

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.