GRIMES AND COMPANY

grimesco.com

Tom Dunlap, CFA

SENIOR INVESTMENT ANALYST

tdunlap@grimesco.com
508-366-3883

Tom joined Grimes & Company in 2025 with 16 years of investment management experience across asset classes and client types. He holds the Chartered Financial Analyst® (CFA) designation and has a BA in Economics from Denison University and an MBA from Boston College.

Tom began his career at Wilshire Associates where he was involved with asset allocation, manager research, and performance and risk analysis. He then spent ten years at Loomis Sayles as an analyst on strategies for a global client base. Most recently, Tom was a partner and senior analyst at Harmony Wealth working on the firm's proprietary equity strategies, customized bond portfolios, and private market opportunities.

Tom and his family live on the North Shore. Together they enjoy skiing, chasing golf balls, going to the beach, and hiking with their dog.

© 2026 Grimes & Company Wealth Management, LLC (d/b/a Grimes & Company) | One Technology Drive, Suite 100, Westborough, MA 01581