grimesco.com

Adam R. Jacobs, CFA, CFP®

VICE PRESIDENT

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Adam leads a team of our skilled Wealth and Client Service Managers that have stretched the firm's client base across the country. Adam sits on both the Investment Council and Executive Council to work on strategic initiatives across the firm.

Adam's interactions with Grimes date back to the early 2000's when Adam was a Fixed Income trader at State Street Global Advisors. He later utilized Grimes' investment management resources while he owned an independent firm providing personal wealth management services, and he joined Grimes & Company in 2010. Adam graduated with a BS degree in Finance & Investments Babson College. Adam is a CFA Charterholder and CFP®. He is a member of the CFA Institute and Boston Security Analysts Society.

When he's not working, Adam loves to spend time with his wife and two children. He enjoys outdoor activities, sports and the humbling experience of golf.

RELATED SERVICES

Financial Planning

Investment Management

Please Note: Limitations. Neither the achievement of any professional designation, certification, degree, or license, membership in any professional organization, or any amount of prior experience or success, should be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results if Grimes is engaged, or continues to be engaged, to provide investment advisory services.

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.