



## Bill Bradford, CRPC<sup>®</sup>

FINANCIAL ADVISOR

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Bill started his career as an advisor in 2007. 2008 taught him more than any textbook could about markets, risks and greed.

Bill set out to help clients and found that the best way to do that is to listen and thoroughly understand their situations, goals and financial needs. He finds the most enjoyable part of his work is collaborating with clients, engaging in financial planning and weighing out risks, obstacles and hurdles. Bill graduated from Colorado State University with a BA in Business Management and an emphasis on economics. He joined Grimes & Company in March 2024. Prior to that, he worked with TD Ameritrade, Citizens bank and most recently, Carson Wealth.

When not working, Bill enjoys spending time with his wife Liz, the outdoors, hiking, biking, skiing, ice hockey and golfing as well as travel and food.

**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.