



Kevin T. Grimes, CFA, CFP®

CEO | CHIEF INVESTMENT OFFICER

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As CEO and Chief Investment Officer, Kevin wears many hats at the firm with roles that include leading the Investment Team and Investment Council, sitting on the Financial Planning Council, Management Team, and Executive Council, as well as serving clients of the firm.

Kevin is Co-Portfolio Manager on all of the firm's tactical investment strategies and serves as Advisor to the Core Equity and Core Dividend individual stock strategies.

Prior to joining Grimes & Company in 1998, Kevin was an Equity Trader at a large independent brokerage in Boston. He graduated from Babson College, where he volunteers and mentors regularly and sits on the Babson endowment Investment Committee. As an industry leader he sits on Fidelity Investments' RIA Leaders Committee as well as the Advisory Panel for Charles Schwab Institutional. He has earned the Chartered Financial Analyst (CFA®) and Certified Financial Planner™ designations. Kevin previously sat on the Board of Directors of the Red Cross of Massachusetts and is a member of The Boston Security Analysts Society (BSAS).

When not working Kevin most likely can be found playing golf or skiing with one of his three children, depending on the season, or otherwise spending as much time with his family as possible.

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