



## Todd A. Herman, CFP<sup>®</sup>

FINANCIAL ADVISOR | FINANCIAL PLANNING SPECIALIST

[therman@grimesco.com](mailto: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<sup>®</sup> (CERTIFIED FINANCIAL PLANNER<sup>™</sup>) 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.

**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.

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**Financial Planning**

