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David C. Grimaldi, MBA CFP®

115 Glastonbury Blvd.

Glastonbury, CT 06033

ph: 860.734.0421

fax: 860.734.0401

David.Grimaldi@IFPAdvisor.com (mailto:David.Grimaldi@IFPAdvisor.com)



Thank you for visiting my website! Whether you are a current client, were referred to me by a client, or learned of my services through your employer, attorney or another professional advisor, I welcome you.

Financial success doesn't happen by chance. It has much more to do with choice. Transforming aspirations into actuality takes acumen, hard work, discipline and strategic financial planning.

When it comes to your financial goals, each decision you make, and action you take, will have a significant impact on your future financial circumstances. Planning objectives are often not realized for one basic reason - there is a lack of clarity in regards to where you want to go and what you want to achieve. Without answering these types of questions, you may be implementing a plan that ultimately doesn't reflect your true desires. A financial blueprint can lay out what you need to do today, in order to help you achieve your goals tomorrow.

When it's a matter of planning for the future, realizing the need to take greater control over your financial life is the first step. Choosing someone who has the ability and resources to address those needs is the next.

My role is to assist you in managing the complexity of your financial life, and to help you toward a better balance in your life and greater control over your finances. And so I listen, clarify and help prioritize your goals and aspirations before developing a financial strategy along with my team to help you toward your vision for the future.

My team and I look forward to getting to know you. In the meantime, please feel free to browse my website.

Regards,
David C. Grimaldi

We work as a team to provide comprehensive financial, retirement, investment, business owner and estate planning strategies using prudent strategies and state-of-the-art software. We can help implement solutions to address your individual needs as well as help you stay on course.

If this makes sense to you, give us the opportunity to have a confidential discussion about your goals.

Mission

Our mission is to get to know and understand your needs, wants, and long-term goals. We want to help you develop, implement, and monitor a strategy that's designed to address

your individual situation. We understand the challenges families face today.

From managing debt to saving for college to retirement, these personal finance challenges can be overwhelming. Our commitment is to utilize all of our resources to help you pursue your goals.

We believe in thinking "out of the box" and we are not afraid to challenge conventional wisdom in our approach to investing and preserving wealth. All of our energy, commitment, and efforts are focused on you, the client, and your satisfaction.

"It takes as much energy to wish as it does to plan." - Eleanor Roosevelt

Our Location



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David.Grimaldi@IFPAdvisor.com

(<mailto:David.Grimaldi@IFPAdvisor.com>)

Request Information

Please let us know how we can serve you.

Name:

Phone Number:

Email Address:

Question/Comment:

Submit

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