

David Grindle, CIMA®

Managing Principal



Contact David Grindle

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Knowing your game plan is critical. After all, assets are only part of financial security. Open and honest conversations, operating with intent, having a clear purpose while defining goals and staying true to the process are just as important.

To David, goals without a plan are just a wish. That's why he develops well-rounded investment strategies before acting with his trademark all-in attitude.

Investing with Impact

David wants his clients to smile, laugh and live vibrantly.

That means understanding what makes up their beliefs, their investment background and goals to find investments that align with core values.

Educating and Evaluating

David earned his Certified Investment Management Analyst® designation from the Investments Management Consultants Association® in conjunction with the Wharton School of Business at the University of Pennsylvania, which helped him build knowledge and experience in analyzing investments, advanced portfolio construction, and risk management - all to make informed financial decisions.

This extensive education plus his over two decades of industry experience helps ground him to be a go-to for plan sponsors and company retirement plans. Additionally, it serves in creating effective investment, retirement income and estate planning strategies for individuals, families, and those businesses.

He also holds FINRA series 7, 24, 63, 65, and SIE securities registrations along with state insurance licenses.

David engages with clients however they want: In-person, virtually, by phone or email.

These interactions create opportunities to meet and to adjust plans or goals as needed, in easy-to-understand language. They also help clients prepare for life changes, major market shifts and hallmark events.

Out of the Office

A former scholarship soccer player at the University of Portland, he considers himself fortunate to volunteer with the Red Cross, Philabundance and the Philadelphia Families Forward organization.

CA Insurance License Number 4230059. Resident State PA

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