

Brian E. Winstead, CFP®

Senior Vice President - Investments



Brian joined Davenport & Company in February 2009. Prior to joining the firm, he was a senior financial advisor and Vice President for 12 years at Merrill Lynch.

Brian graduated from the University of North Carolina at Chapel Hill with a BS in biology. He is Series 7, 63, 65 and 66 registered and is licensed to offer long-term care insurance. He is also a CERTIFIED FINANCIAL PLANNER® professional, earning his certification from the CFP Board. As a CFP® professional, Brian is obligated to uphold principles of integrity, objectivity, competence, fairness, confidentiality, professionalism and diligence.

In his free time, Brian enjoys spending time with his family, reading, and UNC basketball. He and his wife, Lauren, have three children, twins Rachel and Jacob, and son, Nathan.