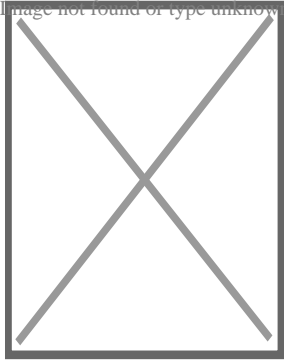


## Our Process



It starts with attentive and careful listening in order to understand your goals and passions. This reveals your personal risk tolerance, time horizons and liquidity needs – all very important to your financial objectives and well-being. We utilize our combined experience together with the intellectual capital of Davenport & Company LLC. Creating a financial plan serves as the ‘base’ roadmap to help monitor the achieving of your goals. We construct an investment and asset allocation strategy that takes into account your total financial picture. Periodic and ongoing discussions and reviews with our clients help keep us all aware of changes that may impact the strategies we have put in place.