

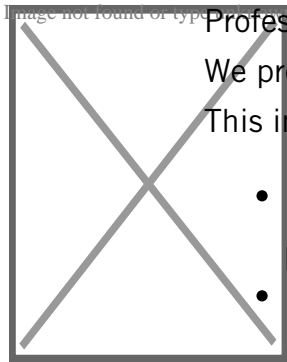


Phone:

Investment Services







Professional Money Management

We provide comprehensive investment solutions tailored to your financial goals.

This includes:

- **Equity Opportunities and Portfolio Management:** Actively managed portfolios focused on maximizing growth through equity investments.
- **Bonds & Fixed Income Investments:** Strategies designed to provide steady income and preserve capital through fixed income securities.
- **Davenport Asset Management Strategies:** Proven investment strategies developed by our experienced team, aligning with your objectives.
- **Access to Manager *Select*:** A curated selection of top-tier investment managers to diversify your portfolio.
- **Tax Information & Calculations:** Expert guidance on tax implications and efficient strategies to optimize your investments. *
- **Alternative Investments:** Opportunities in non-traditional assets that can enhance diversification and potential returns.

Financial and Retirement Planning

We help you create a roadmap to financial success with services that include:

- **Goals-Based Financial Planning:** Personalized plans focused on achieving your specific financial aspirations.
- **DMAP:** Service that allows Advisors to manage client retirement assets (401Ks, 403Bs, etc.) without being custodied at Pershing.
- **Social Security Benefits Analysis:** In-depth evaluation of your Social Security options to maximize your benefits.
- **Roth IRA Conversion Analysis:** Assessing the potential advantages of converting traditional IRAs to Roth IRAs.
- **Periodic Tax and Retirement Planning Updates:** Regular reviews to keep your plan aligned with changing laws and personal circumstances.
- **Education Planning (529 Plans):** Strategies to save for educational expenses, maximizing tax advantages and growth.
- **Charitable Gifting & Philanthropic Giving:** Guidance on effective strategies for charitable donations and maximizing your impact.

Insurance Services

Securities and Advisory Services offered through Davenport & Company LLC Member: NYSE | FINRA | SIPC

We offer comprehensive insurance solutions to protect your assets and financial future, including:

- **Annuity Contracts & Reviews:** Evaluation and management of annuity

