

# Lipscomb, Gregory & Young

of Davenport & Company LLC



## **Whitey Lipscomb**

### *Executive Vice President-Investments*

Whitey has been in the financial services industry for more than 50 years. He is an honorary member of Davenport's Board of Directors and former member of the firm's Executive Committee. Whitey advises clients and guides them on a variety of asset allocation services including equity, fixed income, and mutual fund strategies.

Whitey graduated from Hampden-Sydney College with a degree in History. Whitey is a former member of the Hampden-Sydney Board of Trustees and is a recipient of the college's Keating Medallion, an award given in recognition for "outstanding service and extraordinary dedication to Hampden-Sydney College." He currently serves on the Westminster Canterbury Foundation Board and The Northern Neck Audubon Foundation Board.



## **Stuart Gregory**

### *Managing Director*

Stuart has been in the financial services industry for more than 35 years, beginning his career at Merrill Lynch in 1984 and later moving his practice to Davenport in 1989. In 2007, he was appointed to Davenport's Board of Directors and in 2018 became a member of the firm's Executive Committee. Through careful financial planning and the utilization of a variety of securities including individual stocks, bonds, mutual funds, and ETFs, Stuart tailors clients' portfolios to best fit their needs and goals.

Stuart earned a BS degree with a double major in finance and economics from Virginia Commonwealth University. Stuart attends the River Road Presbyterian Church where he has served as both an elder and currently serves as an Endowment Fund Trustee and a member of the Finance Committee. He has also served on the St. Gertrude High School Finance Committee.



## **Church Young**

### *Managing Director*

Church began his career in the securities industry in 1993 as a Financial Advisor with Wheat First Butcher Singer (now Wells Fargo Advisors). In 1999, he moved his successful financial practice to PaineWebber which later became UBS. Church joined Davenport in 2006 as a First Vice President-Investments. Today, Church uses his more than 20 years of investment experience to serve individuals and small businesses with thoughtful life goals planning and professional money management solutions. Before entering the investment business, Church worked for 10 years at James River Corporation in marketing, manufacturing, and product development.

He is a graduate of St. Christopher's School and earned a BA degree in Economics from Hampden-Sydney College. Church serves on the Investment Committee of Central Virginia Food Bank. In 2023, Church was elected to Davenport's Board of Directors.



## **Jack Trigg**

### *Associate Financial Advisor*

Jack joined Davenport in 2018 in the firm's Client Services department. In this role, he learned firm software and technology platforms and served on the help desk assisting advisor teams and clients with their accounts. In 2021, Jack helped lead a team who helped clients transition their account information to a new online platform. In October 2022, Jack joined the Lipscomb, Gregory & Young team as a Client Service Associate and became an Associate Financial Advisor in January 2024.

Jack is a graduate of Hampden-Sydney College where he earned a BA in History. He is Series 7 and 66 registered. In his free time, he enjoys hunting, fishing and spending time with friends and family.



**Kristi Fulcher**

*Registered Client Service Associate*

Kristi joined Davenport in January 2023 as a Client Service Associate for Lipscomb, Gregory & Young. An integral member of the team, she assists with administrative and operational support and opening accounts. Prior to joining Davenport, Kristi served as a Branch Office Administrator for Edward Jones. She graduated from Virginia Commonwealth University with a degree in Business Administration.

In her free time, Kristi enjoys working in the yard and hiking. She and her husband, Mark, reside in Richmond and have six children.



**Will Morris**

*Registered Client Service Associate*

Will joined Davenport in 2023 as a Client Service Associate for Lipscomb, Gregory & Young. In this role, he assists clients with day-to-day operations, opening accounts, account maintenance and general customer service.

Will is a graduate of Virginia Tech where he earned a BS in Corporate Finance. In his free time, he enjoys hanging out with friends and family and spending time outside hunting, fishing, skiing and walking with his dog.