5400 Discovery Park Boulevard Suite 301
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Toll-Free: (800) 813-2067
AFAgroup@investdavenport.com

Anderson Financial Advisory Group

of Davenport & Company LLC

David C. Anderson, CFP®

Managing Director

Dave serves on the Davenport Board of Directors and is former member of the Davenport Executive Committee. He began his career in the securities industry in 1992 and has 30 years of experience helping individuals and families plan for their financial future.

Dave earned his B.S. Degree at the College of William and Mary, where he has also completed graduate coursework in their MBA program. In addition, he achieved his CERTIFIED FINANCIAL PLANNER™ designation in 1998. Dave is active in the Williamsburg community and has served as Trustee and Treasurer of the Williamsburg Community Health Foundation; as a long-term Board Member of the Lackey Free Medical Clinic; and is active in the local faith community. He and his wife, Anne, have three children and reside in Williamsburg.

Colleen Stephenson

Investment Executive

Colleen focuses on helping clients achieve their goals by planning for their futures and preparing educational seminars. She joined Davenport & Company in 2006, and prior to her role as a Financial Advisor, she served as a Client Service Associate, a role which helped her develop a deep understanding of Davenport and the products and services the firm offers its clients. Her attention to detail and commitment to excellence have given clients the confidence and comfort that their interests are being well cared for. Colleen is experienced in annuities, insurance, and retirement planning.

Colleen graduated from Virginia Tech with a B.S. in Family Financial Management. She is a FINRA Registered Representative, an Investment Advisor Representative, and is licensed to sell insurance products including Life & Health and Variable Annuities. Colleen resides in Williamsburg with her husband, Ryan, and their three children.

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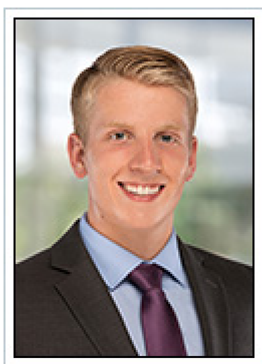
James McCormick, CIMA®

Investment Associate

Ian joined the Anderson Financial Advisory Group in the fall of 2015. He focuses on portfolio management and new business development, as well as assisting with corporate retirement plans. He is a FINRA Registered Representative and an Investment Advisor Representative. In 2020, Ian received the Certified Investment Management Analyst® designation from the Investments and Wealth Institute®, in conjunction with the Yale School of Management. Prior to joining Davenport, he was a Sales Representative for Printpack Inc.

Ian graduated from University of Mary Washington with a degree in Economics. In 2008, he was an Academic All-American. In his free time, Ian enjoys spending time with family, competing in triathlons, and running. He is currently the Head Swim Coach for Warhill High School, serves on the 757 Swim Board and volunteers with WFIA. He and his wife, Sarah, reside in Williamsburg with their three children.



Jacob J. Clark, CFP®

Financial Consultant

Jake is a CERTIFIED FINANCIAL PLANNER™ for Anderson Financial Advisory Group. He is responsible for working with new and current clients to identify goals, build a retirement plan and offer objective advice on achieving those wealth planning goals.

Jake graduated from Virginia Tech with a B.S. in Finance and a concentration in Certified Financial Planning (CFP®). While in school, Jake interned with Anderson Financial Advisory Group for two years and joined full-time shortly after graduation.

Jake's Grandmother was a financial advisor in Hubbard, Ohio and part of his motivation to become a part of the financial industry. Jake spent his childhood in Williamsburg and he currently resides there with his wife, Lauren, and their two dogs, Indy and Ridge. Outside of work, you can find Jake walking in Colonial Williamsburg with his dogs, on the golf course or hiking the Blue Ridge Mountains. He is also on the board of NATASHA House and an active member of LifePointe Christian Church, where he leads a Dave Ramsey course called Financial Peace University.

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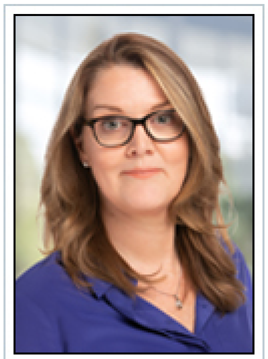

Sherri L. Petefish

Registered Client Service Associate, Vice President-Investments

Sherri has worked with Dave Anderson since 1998. She focuses on providing excellent client service and account management. She is a FINRA Registered Representative, an Investment Advisor Representative, and is licensed to sell insurance products including Life & Health and Variable Annuities. Sherri is a long-time resident of Williamsburg.