

## Colleen Stephenson, CRPC®

Investment Executive



Colleen focuses on helping clients achieve their goals by planning for their futures and creating a financial plan to guide them to and throughout retirement. 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 holds the Chartered Retirement Planning Counselor<sup>SM</sup> designation from the College for Financial Planning and 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 currently serves as a board member of Avalon Center. She resides in Williamsburg with her husband, Ryan, and their three children.