

## Winstead Coghill Group

of Davenport & Company LLC



### **Brian E. Winstead, CFP®**

#### *Senior Vice President - Investments*

Brian joined Davenport & Company in February 2009. Prior to joining the firm, he was a senior financial advisor and Vice President for 12 years at Merrill Lynch.

Brian graduated from the University of North Carolina at Chapel Hill with a BS in biology. He is Series 7, 63, 65 and 66 registered and is licensed to offer long-term care insurance. He is also a CERTIFIED FINANCIAL PLANNER® professional, earning his certification from the CFP Board. As a CFP® professional, Brian is obligated to uphold principles of integrity, objectivity, competence, fairness, confidentiality, professionalism and diligence.

In his free time, Brian enjoys spending time with his family, reading, and UNC basketball. He and his wife, Lauren, have three children, twins Rachel and Jacob, and son, Nathan.



### **Brian J. Coghill**

#### *Senior Vice President - Investments*

Brian joined Davenport & Company in February 2009. Prior to joining the firm, he was a senior financial advisor, Vice President and Complex Sales Manager for 13 years at Merrill Lynch.

Brian graduated from the University of North Carolina at Wilmington with a BS in finance and a BA in history. He is Series 7, 63, 65 and 66 registered and is licensed to offer long-term care insurance.

Active in his community, Brian serves as Treasurer of the board of the Greensboro Ballet. He is a former board member of the UNCW Board of Visitors, and a member and past president of the Greensboro Airport Rotary. In his free time, Brian enjoys spending time with his family, fishing, cooking and playing golf. He and his wife, Heather, have two children, Anna and Grant.



**Dale S. Babcock**

*Client Service Associate*

Dale joined Winstead Coghill Group as a Client Service Associate in January 2022. Her primary responsibilities include assisting clients and providing operational and administrative support for the team. Prior to joining Davenport, Dale worked at FuturePlan by Ascensus as a Retirement Consultant and at Qualified Plan Administrators, Inc. as a Benefits Administrator.

Dale graduated with a B.S. in Accounting from Guilford College. Active in the community, she has taught Sunday school at Lebanon Baptist Church since 2002, volunteers with the Lebanon Baptist Church Food Pantry, and served as the PTA Secretary at Madison Elementary School. In her free time, Dale enjoys reading, taking walks, Zumba and spending time with family including husband, Richard, their two children, Jake and Henry, and her dog and cats.