

## Brian T. Mathis, CFP®

Managing Director



In April 2024, I made the decision to move my wealth management practice to Davenport & Company LLC. Prior to joining Davenport, I was a financial advisor at Edward Jones for 26 years. During my career, I have mentored and coached newer financial advisors, have lectured and taught training classes, and ran advanced workshops on topics ranging from portfolio building to estate considerations to tax-efficient investing strategies. I am proud to say that for the past three years I have been named as one of Forbes Best-in-State Wealth Advisors in North Carolina.\*

I collaborate with my clients to offer customized strategies to help them achieve their financial goals. From a widow who is courageously facing the next chapter of life, to an entrepreneur whose long hours and risk-taking have finally paid off. From an executive who wants to help ease the burden of beloved heirs, to a business owner who wants to help employees prepare for retirement.

I graduated from William & Mary with a BS in Finance and attended North Carolina State's Masters in History program. Throughout my career my wife, Lisa, has been my biggest supporter. Our two children fulfilled a dream by attending and graduating from our Alma Mater, William & Mary in Williamsburg, Virginia. Outside of work, I am committed to giving back to my community and have served as a past board president for Temple Theater. I enjoy playing golf and pickle ball, and classic cars.

*\*2022-24 Forbes Best-in-State Wealth Advisors for NC, awarded 1st quarter each year, research by SHOOK Research, LLC. Data as of June of the previous year. Compensation provided for using, not obtaining, the rating.*

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Brian Mathis is registered with the Financial Industry Regulatory Authority to offer securities services to clients who reside in Alabama, Arizona, California, Colorado, Connecticut, Delaware, District of Columbia, Florida, Georgia, Hawaii, Idaho, Illinois, Indiana, Iowa, Kentucky, Maine, Maryland, Massachusetts, Michigan, Minnesota, Mississippi, Missouri, Nevada, New Hampshire, New Jersey, New Mexico, New York, North Carolina, Ohio, Oregon, Pennsylvania, Puerto Rico, South Carolina, Tennessee, Texas, Utah, Vermont, Virginia, Washington, West Virginia, Wisconsin. Brian is licensed to offer insurance and annuity products to residents in Arizona, Delaware, Florida, Georgia, Idaho, Illinois, Massachusetts, New Jersey, North Carolina, Oregon, South Carolina, Tennessee, Texas, Virginia, Vermont, and Wisconsin.