ABOUT DAVENPORT & COMPANY LLC

At Davenport, we believe that wealth management is timeless. Opportunities arise, trends change, and technologies evolve — but the fundamentals of investment research and management remain. Our financial advice and personal service are the foundation of our success with individuals and institutions across generations. We know that there is more to our business than delivering high-quality financial services; it is about building meaningful relationships.

For more than 155 years, Davenport has attracted talented professionals of integrity with a wide range of experience and expertise who serve a broad base of individuals and families as well as municipalities, foundations, and institutions. Davenport's Asset Management division offers five publicly available mutual funds which have been recognized for excellence by Morningstar and Kiplinger, among others.

Founded and headquartered in 1863 in Richmond, Virginia, Davenport has office locations across the mid-Atlantic. We are committed to being an active participant in the communities in which we live and work. Davenport Shares, our employee-run philanthropic initiative, actively supports local organizations and dedicates company time and resources for volunteer activities.

To learn more about Davenport, visit investdavenport.com.

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STRATEGY | DISCIPLINE | FOCUS

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Life is a series of transitions from childhood to adulthood—from career to retirement—from one generation to the next. To manage life's transitions, you and your family need a sound financial strategy. One that is strong enough to endure through decades, yet flexible enough to accommodate continuous change.

Kane Investment Strategies offers you a time-tested approach to financial consulting and asset management. Michael Kane is focused on building long-lasting relationships with clients by providing you with the highest level of professional advice and personal service.

Fully engaged in helping our clients pursue their life goals

Controlling risk by implementing sound investment strategies

INVESTMENT PHILOSOPHY

Kane Investment Strategies creates thoughtful investment plans using an objective and disciplined process to enable our clients to pursue investment goals intelligently.

Michael is committed to providing objectivity in all phases of the investment process. His money-management capability is the bedrock of that commitment and he draws on his experience and knowledge in helping clients build and preserve wealth. As a client, you can choose the type of relationship and assistance you prefer. His services range from traditional brokerage to professionally managed fee-based accounts and he can also manage your money in the same manner as we manage our own money in Davenport's Employee Profit Sharing Plan.

Michael's "Value" equity strategy involves trying to understand what a rational buyer would be willing to pay for a given company. The valuation process may focus on asset values, earning power, free cash flow, balance sheet, or a combination of these variables. We are backed by in-house research and a network of industry experts who provide fundamental and technical research on individual equities, bonds, and mutual funds. These valuable resources are essential elements of the investment services we offer through the Flexible Managed Portfolio.

INVESTMENT PROCESS

The role of Kane Investment Strategies is to provide stewardship and oversight as you pursue your financial and life goals. The process includes:

- Carefully listening to you regarding goals, risk tolerance, and time horizon.
- Creating an investment and asset allocation strategy as the basis for your customized portfolio.
- Helping you select the most appropriate investments, which may include stocks, bonds, mutual funds, or recommending professional money management services.
- Conducting regular portfolio reviews and responding to changes that may call for adjustments and updates to your investment plan.
- As needed, we will also coordinate with your other professional advisors including your CPA, attorney, and in some cases, your insurance agent.

KEEPING YOU INFORMED

You have numerous choices when it comes to selecting a trusted financial advisor. That's why Kane Investment Strategies constantly strives to show our appreciation for your business by providing exceptional personal service including:

- In-person portfolio review meetings as you request or require
- Online access to your account balances, positions, and activity
- Monthly summary of positions and transactions
- An annual tax-reporting summary
- Timely research updates and educational seminars

PROFESSIONAL QUALIFICATIONS

Michael J.D. Kane
Managing Director–Investments

Mike has more than 40 years of experience in the securities industry. After earning a BS degree in Marketing from Lehigh University, Mike worked for two years at Procter & Gamble in the Food Products division. After completing his first year with P&G in Brooklyn, New York, he was transferred to Virginia Beach to work in military sales. One year later Mike was presented with an attractive opportunity to join the investment firm, Bache Halsey Stuart & Shields (which later became Prudential-Bache Securities) in their Norfolk office. In 1995, Mike moved his successful financial practice to the Virginia Beach office of Davenport & Company.

Mike is Series 7, 8, 24, 63 and 65 registered with the Financial Industry Regulatory Authority (FINRA). He and his wife, Melissa, have two daughters. In his spare time, he enjoys staying fit by cycling with Tri Power Cycling.

Katey A. Birmingham
Associate Vice President–Investments
Registered Client Service Associate

Katey began her career in 1995 as a Shareholder Account Representative with American Funds Service Center. Before joining Davenport in December 2004, she worked as a Sales Assistant with D. Barry Iacono & Associates where she was responsible for managing various client services and reports.

In her role with Kane Investment Strategies, she is responsible for overseeing the group's client relationships and operations.

Katey is Series 7 and 66 registered with FINRA.