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Professional Money Management

- Equity Opportunities & Portfolio Management
- Monthly income with potential for growth
- Risk reduction

Customized Financial Planning

- Retirement, educational, gifting and estate needs
- Marriage, divorce, and caregiving needs
- Sale/acquisition of family business
- Mortgage, personal and Bridge Loan needs

Range of Security Types

- Stocks, Bonds, ETFs, Mutual Funds*
- Managed Futures, Options, and Alternative Investments
- Short term cash & cash equivalents
- Tax** deferring vehicles: 401k plans, SEPs, IRAs, Roth IRAs,& Annuities

Investment Research

- Access to reports from Davenport & Company, Value Line,Morningstar, Argus, Dorsey Wright, Credit Suisse, Sterling AssetManagement***

Costs

- Traditional commission based transactions
- Fiduciary standard % based fees that rise and fall with portfoliovalue

* Mutual Fund investing involves risk, principal loss is possible. Investors should consider the Fund’s investment objectives, risks, charges, and expenses carefully before investing. The Fund’s prospectus contains this and other important information, should be read carefully before investing or sending money, and may be obtained from your Financial Advisor, www.investdavenport.com, or by calling (888) 285-1863.

***Davenport & Company is a financial services firm and does not provide tax or legal advice. Please consult your professional accounting or legal advisors prior to acting on any information provided by us that may have an effect in these areas.*

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