

# Freeman Wealth Management

of Davenport & Company LLC



## **Steven R. Freeman, AAMS<sup>®</sup>, CIMA<sup>®</sup>, CPWA<sup>®</sup>**

### *Managing Director*

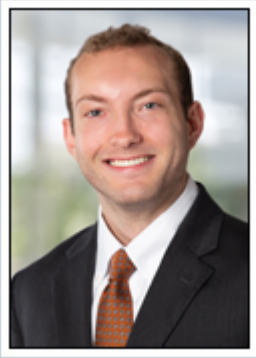
Steve has more than 30 years of experience in the finance industry. He joined Davenport after 26 years with Truist Investment Services, formerly BB&T Scott & Stringfellow. Prior to that, he worked for Kidder, Peabody & Co. for eight years.

Steve served on BB&T Scott & Stringfellow's Advisory Board and Consulting Services Advisory Board. During his tenure, he was recognized for superior practice management, investment design and client service by receiving the following awards: President's Advisory Council, Distinguished Consultant Award and BB&T Sterling Performer.

Steve is an Accredited Asset Management Specialist. He is also a Certified Investment Management Analyst and a Certified Private Wealth Advisor, two of the highest designations in the industry. Steve graduated with a B.S. from Virginia Tech and an M.S. from Florida Institute of Technology. He is Series 7, 31, 63 and 65 registered with FINRA and is licensed to offer insurance and annuity products.

Active in the community, Steve is on the Judeo Christian Outreach Center board and has been involved in numerous other charities. He enjoys reading, exercising and spending time with his family.

*Professional designations do not guarantee success or client satisfaction and should not be viewed as the sole determining factor in evaluating an investment adviser.*



**Barclay P. Freeman**

*Financial Advisor*

Prior to joining Davenport, Barclay was a Financial Advisor with Truist Investment Services, formerly BB&T Scott & Stringfellow. In May of 2020, he teamed up with his father, Steven Freeman, to provide affluent individuals and families exceptional service and help them reach their own vision of success and significance by building and protecting wealth.

Barclay graduated from the University of Virginia with a B.A. in Economics. He is Series 7 and 66 registered with FINRA. In his free time, Barclay enjoys spending time at the beach and playing tennis.

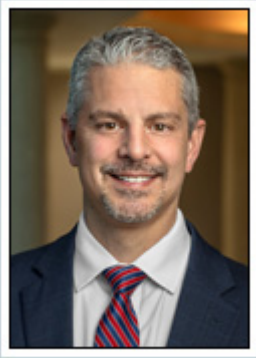


**Abby Guinn**

*Associate Vice President, Client Service Associate*

Prior to joining Davenport, Abby worked for 30 years as a Client Service Associate at Truist, formerly BB&T Scott & Stringfellow. As an essential member of the team, Abby provides operational and administrative support for clients of Freeman Wealth Management.

Abby attended the University of Kentucky. In her free time, she enjoys cooking, reading, antiquing and traveling.



**Chris LaRocca, CFP®, TPCP®, AEP®**

*Financial Advisor*

Chris joined Davenport in December 2023. Prior to joining the firm he worked at Truist, formerly BB&T Securities, for more than 15 years as a Wealth Advisor. Chris enjoys building relationships with people to understand their “purpose” and is passionate about helping them maximize the fulfillment and enjoyment in their lives. Chris offers clients investment management, retirement planning, survivor and long term care planning, estate planning and wealth transfer strategies. He specializes in working with business owners, executives and retirees.

Chris earned a B.S. in Business and Psychology from State University of New York at Stony Brook. He is Series 6, 7, 24, 63 and 66 registered with FINRA. He holds CERTIFIED FINANCIAL PLANNER® (CFP®), Tax Planning Certified Professional (TPCP®), and Accredited Estate Planner (AEP®) professional designations.\*

Chris and his wife, Nicole, live in Chesapeake, Virginia, with their three children. When they’re not attending after-school sports with their kids, they enjoy managing their family farm. Chris also enjoys engaging in his community, serving on the board of the Hampton Roads Estate Planning Council as well as the Grantmaking Committee for the Community Leadership Partners of the Hampton Roads Community Foundation.

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