

## Sam Sweeney, CFP®

Associate Financial Advisor



Sam joined Davenport in November 2020 and worked in the firm's Client Services department before joining the Beadell, Dolan & Kastenbaum team in 2021. Prior to joining Davenport, he worked as an Investment Analyst at 1st Source Bank where he supported financial advisors and worked on data aggregation and performance tracking. Sam's experience also includes working as a Client Services Officer assisting with corporate bond underwriting at Fulton bank. Sam is Series 7 and 66 registered with FINRA and he is licensed to offer insurance and annuity products. Sam also earned and maintains the CERTIFIED FINANCIAL PLANNER® certification.

A graduate of Ithaca College, Sam earned a Bachelor's degree in Business Administration with a concentration in Finance. Sam was the captain of his college ski team and competed in giant slalom and slalom ski racing. Sam's Father was a financial advisor for 50 years and helped emphasize the importance of building trust with clients and doing what is right rather than what is easy.

A Lancaster, Pennsylvania native, Sam moved to Richmond in July 2020. In his free time, he enjoys sports, the outdoors, traveling, music, fitness, and spending time with friends and family, including his wife, Madison.