

## Jim Whelen

Senior Vice President - Investments



Jim began his career in 1987 working as an institutional trader on the floor of the New York Stock Exchange. This experience culminated in Jim joining Davenport in 2006 as the head of the Institutional Equity Trading department. After more than 30 years of working with many of the country's largest and most sophisticated money managers and institutions as his clients, in 2014 he began his second career at Davenport as a financial advisor. Drawn by the appeal of working with individuals and families, Jim enjoys having the ability to create a relationship with each of his clients as he helps guide them in their financial journey.

Jim loves to travel, inspired by his childhood where he went to elementary school in Taiwan and high school in Japan. That said, Jim proudly calls Richmond home. After all, he married his college sweetheart who he met at VCU.