

Connor Levenson, CFP®

Financial Consultant



Connor is a CERTIFIED FINANCIAL PLANNER® professional and holds an MBA with a concentration in finance from the College of William & Mary, Raymond A. Mason School of Business as a McGlothlin Leadership Scholar. He also obtained a BS degree in finance from Virginia Tech, Pamplin College of Business during his undergraduate studies. Connor entered the securities industry in 2015 as an intern at Davenport & Company prior to the completion of his undergraduate degree. He subsequently accumulated over six years of consulting experience working for Deloitte & Touche and Protiviti serving large federal and commercial clients in the Washington D.C. area. Connor resides in Williamsburg with his wife, Ali, his son, Greysen and two Golden Retrievers, Hudson and Birdie. He enjoys playing golf, being on the James River, and spending time with family and friends.