The Lutterloh 201 Chatham Street,
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Phone: (919) 777-9825
Toll-Free:
MathisWM@investdavenport.com

Mathis Wealth Management

of Davenport & Company LLC

Brian T. Mathis, CFP®

Managing Director

In April 2024, I made the decision to move my wealth management practice to Davenport & Company LLC. Prior to joining Davenport, I was a financial advisor at Edward Jones for 26 years. During my career, I have mentored and coached newer financial advisors, have lectured and taught training classes, and ran advanced workshops on topics ranging from portfolio building to estate considerations to tax-efficient investing strategies. I am proud to say that for the past three years I have been named as one of Forbes Best-in-State Wealth Advisors in North Carolina.*

I collaborate with my clients to offer customized strategies to help them achieve their financial goals. From a widow who is courageously facing the next chapter of life, to an entrepreneur whose long hours and risk-taking have finally paid off. From an executive who wants to help ease the burden of beloved heirs, to a business owner who wants to help employees prepare for retirement.

I graduated from William & Mary with a BS in Finance and attended North Carolina State's Masters in History program. Throughout my career my wife, Lisa, has been my biggest supporter. Our two children fulfilled a dream by attending and graduating from our Alma Mater, William & Mary in Williamsburg, Virginia. Outside of work, I am committed to giving back to my community and have served as a past board president for Temple Theater. I enjoy playing golf and pickle ball, and classic cars.

**2022-24 Forbes Best-in-State Wealth Advisors for NC, awarded 1st quarter each year, research by SHOOK Research, LLC. Data as of June of the previous year. Compensation provided for using, not obtaining, the rating.*

Securities and Advisory Services offered through Davenport & Company LLC Member: NYSE | FINRA | SIPC

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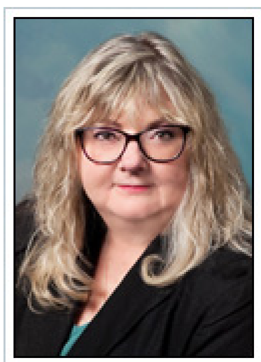
Carter Mathis

Financial Advisor

Carter joined Davenport in July 2025. Prior to joining the firm, he was an Investment Management Consultant at Fidelity Investments for four years. In this role he assisted clients with managing their accounts and helping them achieve the right mix of equities. He also spent two years with Edward Jones as a Branch Office Administrator assisting the advisor with the day-to-day functions of the office. At Davenport, he works closely with the Mathis Wealth Management team to help create a bright and secure financial future for their clients. Carter is Series 7 and 66 registered with FINRA. He graduated from the College of William and Mary with a bachelor's degree in Kinesiology and Geology.

Active in the community, Carter is involved with a local pole-vaulting gym where he coaches and mentors young pole vaulters from throughout the region. In his free time, he enjoys traveling to new locations to hike and camp and staying active through running, biking and skiing. When not on the go, he enjoys keeping up with anything car related and collecting watches.



Jackie D. Barnes

Associate Vice President,
Client Service Associate

Jackie was a Senior Branch Office Administrator at Edward Jones for 22 years before joining Davenport in April 2024. Recognized for excellence, Jackie received several awards for Level Achievements while at Edward Jones. Jackie's utilizes her insurance experience and customer service skills to assist the team's clients. Jackie earned an associate degree in Criminal Justice from Central Carolina Community College. Jackie has one son and two grandchildren who she enjoys taking to taekwondo and dance classes. She enjoys watching and attending NC State and Carolina Hurricanes games, loves animals and her hobbies include reading, crafting, drawing and sketching.

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