

## Owen, Whelen & Thompson

of Davenport & Company LLC



### **Gaillard Owen, CFP®**

#### *Managing Director*

Gaillard began his career in 1983 when Reagan was president, the Dow was 1200 and interest rates were 11%. By navigating financial fluctuations over the ensuing decades, he has gained a wealth of experience and knowledge which he has used to guide his clients. His commitment to service and attention to detail has allowed him to earn his clients' trust and friendship through multiple generations of families. His focus on the financial planning process is evidenced by his accreditation as a CERTIFIED FINANCIAL PLANNER® professional.

In 2007, Gaillard moved his successful financial practice from A.G. Edwards & Sons to Davenport & Company and in 2015 he formed a partnership which has grown into Owen, Whelen & Thompson Wealth Management. Gaillard enjoys working with a team of knowledgeable and conscientious colleagues and friends.

Gaillard lives in Ashland, Virginia, sometimes called "the center of the universe" in the house he grew up in and where he and his wife, Carol, raised their two children.



### **Jim Whelen**

#### *Managing Director*

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.



**Joe Thompson, CFP®, CPA**

*Vice President-Investments*

Joe entered the financial services industry in 2012 after starting his career as an auditor for Deloitte. Prior to joining Owen, Whelen & Thompson, he was a Financial Planning Associate in Davenport's Financial Services department where he developed and presented financial plans and ran analyses for hundreds of clients.

Joe uses his varied financial background and perspective to help his clients plan for the future and navigate the complexities of their financial lives. Joe holds a CERTIFIED FINANCIAL PLANNER® certification, and he is also a Certified Public Accountant. A graduate of the University of Virginia's McIntire School of Commerce, Joe has lived in Virginia for most of his life and met his wife, Emily, while attending UVA.

When he is not in the office, Joe is kept busy by his two young boys, Finn and River. He is counting the days until they are out of diapers.

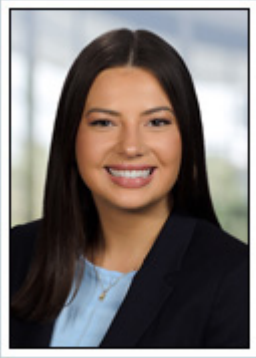


**Kimberly "Kim" Blanchard**

*Vice President, Registered Client Service Associate*

Kim has more than 40 years of experience assisting clients, over 20 of which have been with Davenport. Kim's attention to detail, strong customer service skills and knowledge of the financial industry make her an integral member of Owen, Whelen & Thompson. She is often the first voice clients hear when calling, and she is responsible for managing the group's client relations and operations.

Born in Danville, Virginia, Kim still visits her hometown and the family farm as often as she can. She enjoys spending her free time with family and close friends. Kim is also a food enthusiast and has been known to use the Owen, Whelen & Thompson group (specifically Joe) as guinea pigs for new recipes.



## **Karli Woodcock**

### *Registered Client Service Associate*

Karli joined Davenport in 2023 as part of the firm's Summer Internship Program. In 2024, she graduated from Virginia Commonwealth University with a BS in mass communications and minor in marketing insights. Following graduation, she worked in Davenport's Client Services Department assisting advisor teams and their clients before joining the Owen, Whelen & Thompson group.

Karli combines her knowledge of the firm and passion for relationship building to help ensure that clients have a seamless client service experience. She is Series 7 and 66 registered and is licensed to offer insurance and annuity products.

Active in the community, Karli serves on the board of directors for the William A. Harrison Jr. Foundation, and she is also a member of The Brandermill Church where she serves on several committees. Karli is a Richmond/Chesterfield native and grew up five minutes down the road from her grandparents. She values her hometown roots and visits with family every Sunday after church. In her free time, Karli loves to travel, spend time outdoors with her dog, River, and enjoys playing on Davenport's co-ed softball team.