

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 has over a decade of experience helping clients plan, save, and invest for the future. Prior to the inception of Owen, Whelen & Thompson WM, he worked as a CPA and auditor for Deloitte and gained his CERTIFIED FINANCIAL PLANNER® designation while working for a boutique wealth management firm in the Florida Keys. At Davenport, Joe also served two years as a Financial Planning Associate where he spearheaded the rollout of the MoneyGuidePro financial modeling software and developed and presented financial analyses for hundreds of Davenport clients.

Joe has lived in Virginia for most of his life and met his wife, Emily (a Richmond native) when they were both 1st years at UVA. They have three young boys, Finn, River & Woods. In his free time, Joe enjoys spending time with his family, playing assorted games (board/card/video), and practicing guitar.

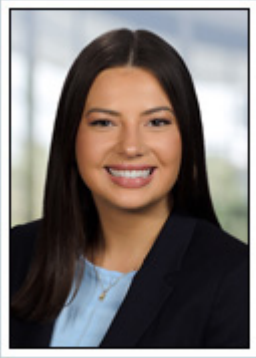


Kimberly "Kim" Blanchard

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 2024, beginning her career in the firm's Client Services Department, where she supported numerous advisor teams and their clients. She later joined the Owen, Whelen & Thompson Group, bringing with her a strong knowledge of firm operations and a passion for cultivating meaningful client relationships. Karli holds her Series 7 and 66 registrations 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. She is also a member of The Brandermill Church, where she contributes her time across several committees. A Richmond/Chesterfield native, Karli met her fiancé, Ryan, while attending James River High School. In her free time, she loves to travel, explore new restaurants around the city, and play on Davenport's co-ed softball team.