

Investment Philosophy

Personalized Wealth Management, Tailored to Your Goals

At Davenport, we provide clients with diverse investment strategies guided by a disciplined approach to wealth management. Our team works closely with you to create a customized financial plan – one that we develop, implement, and monitor together. By carefully balancing responsible investments with risk, we design an investment strategy that aligns with your goals, helping to grow and protect your wealth.

We can offer Davenport Asset Management portfolios which are managed in the same manner as we manage our own money in Davenport's Employee Profit Sharing Plan. Over 30 years ago, the firm started the plan with a deep obligation to protect and grow employees' retirement assets. In 1984, the same investments were made available to clients. Today, while the number of options and styles have increased, our philosophy remains the same in that we align your interests with our own. There is no better way to make us accountable and no greater testament to our conviction.

In addition to having access to Davenport Asset Management, our clients also have access to a fundamental long-term investment approach where our team of experienced advisors carefully select investments based on thorough research and financial analysis. We seek to invest in high-quality companies with strong balance sheets, consistent earnings growth, competitive advantages with forethought on market and economic trends, as well as solid management teams.

Our team also has access to a list of premier outside money managers and mutual funds. Our Fixed Income Department maintains a wide selection of preferred stocks, corporate, municipal, and government bond offerings for designing fixed income portfolios to provide steady income. You can establish either a fee-based or traditional commission-based brokerage account.