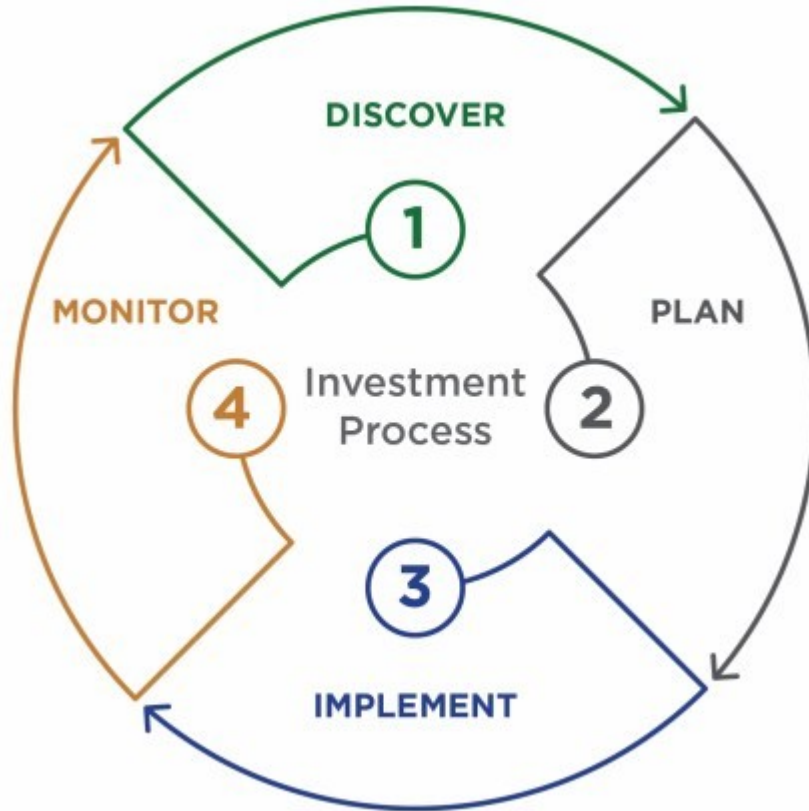


Our Process





Providing a team approach to investing, our role is to provide stewardship and oversight as you pursue your financial and life goals. Our process includes:



1 – Discover

- Listen to Needs
- Identify Goals
- Determine Risk Tolerance
- Evaluate Resources

2 – Plan

- Create Your Personalized Financial Plan
- Retirement
- Living Expenses
- Education
- Life & Health
- Estate Planning

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

3 – Implement

- Asset Allocation

