



Services

INVESTMENT SERVICES

- Individual Stocks & Bonds
- Mutual Funds & Unit Investment Trusts
- Exchange Traded & Closed-End Funds
- Davenport Asset Management — offering various professionally managed investment strategies
- Fixed and Variable Annuities
- Certificates of Deposits, Money Market & Cash Management Service

FINANCIAL PLANNING SERVICES

- Net Worth & Asset Allocation Analysis
- Education Planning and 529 Plans
- Retirement Planning and Cash Flow Analysis
- Employee Stock Option Analysis
- Planning for Tax, Estate & Charitable Giving Needs
- Coordinating with your CPA and Estate Attorney to implement recommendations

INSURANCE SOLUTIONS

Davenport's team of dedicated insurance specialists is available to offer independent and objective advice for life insurance, long term care insurance, and disability income insurance. Areas of expertise include:

- In-Force Policy Reviews
- Provider Company Evaluations
- New Policy Design, Selection & Placement

Davenport & Company is a financial services firm and does not provide tax or legal advice. Please consult your professional accounting or legal advisors prior to acting on any information provided by us that may have an effect in these areas.