Phone:

Our Process

DAVENPORT
BUILDING WEALTH TOGETHER
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Everything we do starts with building a lasting relationship. We seekto understand our client’s financial goals and challenges. We lookforward to helping create and implement solutions for each situation,and as their life marches on and inevitably changes we are right therealongside helping support and adapt with them. We believe that smallsteps consistently made over time lead to large impacts. Our goal is tohelp create peace of mind with our clients knowing that their moneyis stewarded at the highest level.

Understand

1. Cash Flow: What does your inflow and outflow look like?
2. Tax Planning: How much planning currently goes into your taxsituation? Are there steps we can take to help you lower your taxbill?
3. Risk Management: How much risk do you want to take on? Wewant to understand where your current risk is and why it isthere.

Implement

1. Cash Flow: What does your inflow and outflow look like? Is thereincome we need to supplement or create within your portfolio?
2. Tax Planning: Retirement account contributions, tax efficientinvestments within brokerage accounts, backdoor strategies, tax-loss harvesting, gifting strategies, etc.
3. Risk Management: Using different strategies from a diversifiedportfolio to define outcome solutions to help your investmentsmatch your risk.
4. Investment Selection: Creating a portfolio of investments that isunique to your needs and goals. We believe every dollar shouldhave purpose and direction in howit is invested.

Adapt

1. Cash Flow: Are there big purchases on the horizon? Has your income changed? Do you need to supplement income? Is there money that needs to be put to work?
2. Tax Planning: Where can we help reduce your tax burden? What key events do we need to plan toward/around?
3. Risk Management: Has your risk or time horizon changed? Are your current investments matched to your risk allocation?
4. Investment Selection: Are there changes that need to be made within your investments to match your risk or time horizon change?

5. Team Coordination: Who are the important members for us to be in communication with (CPA, Attorney, Trustee, POA, etc.). Is there an area of need that we can help connect you with a professional? We aspire to see the “full picture” and help to