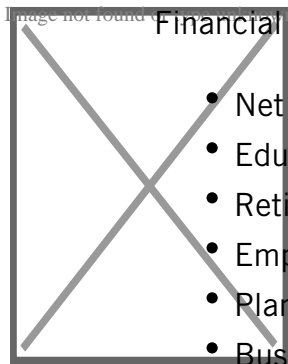




Phone:

Services



Financial Planning Services

- Net Worth and Asset Allocation Analysis
- Education Planning and 529 Plans
- Retirement Planning and Cash Flow Analysis
- Employee Stock Option Analysis
- Planning for Tax, Estate and Charitable Giving Needs
- Business Succession, Sales, and Valuation
- Sudden Wealth Planning

Investment Services

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

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 and Placement

Davenport & Company LLC 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.

Investing in securities carries risk including the loss of principal.