

Carter Mathis

Financial Advisor



Carter joined Davenport in July 2025. Prior to joining the firm, he was an Investment Management Consultant at Fidelity Investments for four years. In this role he assisted clients with managing their accounts and helping them achieve the right mix of equities. He also spent two years with Edward Jones as a Branch Office Administrator assisting the advisor with the day-to-day functions of the office. At Davenport, he works closely with the Mathis Wealth Management team to help create a bright and secure financial future for their clients. Carter is Series 7 and 66 registered with FINRA. He graduated from the College of William and Mary with a bachelor's degree in Kinesiology and Geology.

Active in the community, Carter is involved with a local pole-vaulting gym where he coaches and mentors young pole vaulters from throughout the region. In his free time, he enjoys traveling to new locations to hike and camp and staying active through running, biking and skiing. When not on the go, he enjoys keeping up with anything car related and collecting watches.