628 Green Valley Road Suite 306
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chowningwm@investdavenport.com

Chowning Wealth Management

of Davenport & Company LLC

Jeffrey Chowning, APMA®

Associate Vice President - Investments

In 1999 Jeff began his career in the financial services industry as an Assistant Floor Trader with the Chicago Stock Exchange. Shortly thereafter, he became an Account Executive with Nuveen Investments LLC, a leader in originating and distributing Unit Investment Trusts. In 2002 Jeff accepted an attractive opportunity to join UBS as a Financial Advisor in Greensboro, North Carolina. Jeff and his partners, David Severance and Jimmy Simmons, joined the Greensboro office of Davenport & Company in 2009. After Jimmy retired in 2023, the team became Severance & Chowning. Following David Severance's retirement at the end of 2025, the group is now Chowning Wealth Management.

Jeff is Series 7, 63, and 65 registered with the Financial Industry Regulatory Authority (FINRA) and is licensed to sell insurance and annuity products. Jeff also holds an Accredited Portfolio Management Advisor™ (APMA®) professional designation. Jeff earned a Bachelor of Arts degree in Business Administration with a minor in Economics from Alma College. He and his wife, Sarah, have two daughters. Outside of spending time with his family, Jeff enjoys music, sports, movies, and reading.

Professional designations do not guarantee success or client satisfaction and should not be viewed as the sole determining factor in evaluating an investment adviser.

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Phillip Danieley, CFP®

Financial Advisor

Phillip joined Davenport in 2024 as a Financial Advisor with the Severance & Chowning group, which became Chowning Wealth Management following David Severance's retirement at the end of 2025.

Phillip graduated from Elon University with a B.A. in English. Prior to joining the firm, he started his career as an Advanced Planning Life Insurance Agent with Policygenius, where he specialized in creating customized strategies for clients with complex insurance needs. Phillip holds a CERTIFIED FINANCIAL PLANNER® professional designation, and he is Series 7 and 66 registered with FINRA.

Outside of work, Phillip enjoys playing guitar and home brewing, collecting and fixing up old typewriters, and reading short stories. He and his wife, Patty take time off each year to travel to her home country of Colombia, and his Spanish gets stronger with each visit.

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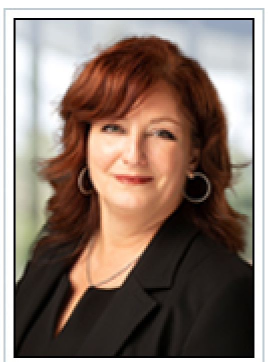

Trudy Shields

Client Service Associate

Trudy joined the Simmons, Severance & Chowning group in December 2017. After Jimmy Simmons retired in 2023, the team became Severance & Chowning. Following David Severance's retirement at the end of 2025, the group is now Chowning Wealth Management.

Trudy graduated with a BS degree from University of North Carolina at Greensboro. Prior to her role at Davenport, her career in banking and finance has included working as a Lead Teller and Senior Teller at PNC Bank; a Loan Originator at Conseco Finance Corporation; and a Financial Sales Advisor at Central Carolina Bank.

Trudy and her husband, Lou, live in Greensboro and have two children. She enjoys time with family, the beach and mountains of NC, driving, gardening, cooking and baking.