

James E. Davidson Jr., CFP®

First Vice President - Investments



My professional career has centered on the important responsibility of helping people and organizations manage resources appropriately.

I began my career in 1995 at CarMax, progressing quickly through the ranks from Buyer-in-Training, to Buyer, then Senior Buyer. In 1997, I was promoted to Purchasing Manager and moved to Arlington, Texas to help open a new location, oversee \$7,500,000 of inventory and mentor the Purchasing Staff. In 1999, I came back to Richmond and joined First Union Bank as a Financial Specialist, gaining broad banking, investment and mortgage financing experience working primarily with individuals and families. I joined Legg Mason as a registered Financial Advisor in 2002 and in 2006 I completed the rigorous education and examination requirements to earn the Certified Financial Planner® professional designation. In 2007, I moved my practice to Davenport.

I earned my BS degree in Psychology major in 1995 from Virginia Commonwealth University and during my senior year I was recognized in the "Who's Who Among Students in American Universities & Colleges. My wife Carolyn and I met at VCU. We have one son, Joshua. I enjoy spending time with my family, traveling, outdoor adventures and playing guitar. Passionate about continuing education and community involvement, I am a volunteer instructor for the Lifelong Learning Institute of Chesterfield (LLI), serve on its Board of Directors and currently manage the LLI Endowment Fund.

In honor of a family member, clients, and other friends with MS, I have participated in the National MS Society Bike MS event and have served as Trustee on the Board of Directors and on the Bike MS committee for the Virginia-West Virginia Chapter of the National MS Society.

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