

Valentine Ferrell

of Davenport & Company LLC



E. Massie Valentine Jr.

Managing Director

Massie brings more than 30 years of investment experience to serving his clients. He began his financial services career in 1980 as a management trainee with United Virginia Bank. Massie joined Davenport in 1982 and worked in the operations department. Shortly thereafter, he became an Investment Executive, and has built a successful financial practice by maintaining long-lasting relationships with his clients and their families. Massie currently serves on Davenport's Portfolio Review Committee and is a member of the firm's Board of Directors.

Massie is a graduate of Woodberry Forest School and the University of Virginia. He is Series 7, 24 and 63 registered and is licensed to offer long-term care and health insurance.

Invested in the community, Massie is a board member of the YMCA of Greater Richmond; the Valentine Museum; of Hollywood Cemetery; and treasurer of St. James's Episcopal Church Endowment Fund. He is a current volunteer and former chairman of Westminster Canterbury Foundation of Richmond; past president of J. Sargeant Reynolds Community College Educational Foundation; former chairman of Virginia Port Authority; former member of the board of trustees for St. John's Church Foundation; and former senior warden of St. James Episcopal Church. Massie and his wife, Margaret, have three children and four grandchildren. In addition to spending time with his family, he enjoys golf, fishing, and playing guitar.



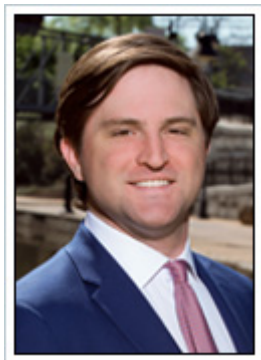
Wortie Ferrell II

Managing Director

Wortie has extensive experience leading organizations and providing sound judgment and counsel. Prior to rejoining Davenport in 2015, Wortie served as the Head of Upper School at St. Mark's School of Texas in Dallas, Dean of Students at Episcopal High School, and teacher and coach at Collegiate School in Richmond. He worked in Davenport's Corporate Finance group from 2002-2003. Wortie believes that investment advisory and school businesses are analogous: both are founded on relationships and both have charged him with protecting and nurturing things clients hold most dear.

Wortie graduated from Princeton University with an AB in history, earned his MBA from the University of Virginia, and his Master of Education from Columbia University. He has his Series 7 and 66 registrations and is licensed to offer long-term care and health insurance.

Within the community, Wortie currently serves on the board of trustees for Collegiate School, Capital Region Land Conservancy, and 7 Hills School. Away from the office, he enjoys spending time with his wife and three children as well as playing racquet sports and golf, reading great books, and coaching youth sports.



William I. Valentine

Associate Vice President - Investments

Will joined Davenport & Company in 2019 to form a team with his father, Massie, and longtime friend, Wortie Ferrell. Prior to joining Davenport, Will worked at Merrill Lynch in Manhattan, where he progressed through the firm's Financial Advisor Development Program. While at Merrill Lynch, he was trained in many areas, spending much of his time focusing on investment strategy design and implementation as a member of a multi-person advisory team. He earned his FINRA Series 7 and 66 registrations as well as his New York State Life and Health Insurance license while employed by Merrill Lynch.

Will was born and raised in Richmond, Virginia, where he attended St. Christopher's School. After graduating from St. Christopher's, Will enrolled at Hampden-Sydney College. Having grown up an avid UVA fan, Will ultimately decided to fulfill his lifelong dream of attending the University of Virginia and transferred there after his first year.

Will grew up an outdoorsman, spending many days hunting, fishing, surfing, and playing sports. He also discovered a passion for service to others. Following on that passion, he joined a local volunteer fire department while he was in high school, where he trained to become a certified firefighter. For the next seven years, Will continued to serve as a volunteer firefighter in both Richmond and Charlottesville. After graduating from college, he decided to move to New York to begin his career in the financial services industry.

In his free time, Will enjoys spending time with his family, duck hunting, fishing, and watching UVA sports. He and his wife, Cele, have two children and reside in Richmond.



Bart Farinholt, Jr.

Associate Financial Advisor

Bart joined Davenport in 2024 as an Associate Financial Advisor. Prior to joining Davenport, he spent seven years in athletics as the program director at Harlem Lacrosse, and most recently Assistant Athletic Director at Collegiate School. In these youth development roles, he focused on building relationships, offering thoughtful guidance, and creating opportunities for others. These experiences taught him the importance of trust, strategic planning, and truly understanding what matters most to the people he serves. As a Financial Advisor, he pulls from these values to assist individuals, families, foundations and endowments, non-profit organizations and businesses meet their financial goals. He is Series 7, 63, and 65 registered with the Financial Industry Regulatory Authority (FINRA), and is licensed to sell insurance and annuity products.

Bart graduated from Denison University with a degree in Communication before receiving his Masters in Sports Business from New York University. Outside of work, he spends time coaching youth sports, boating, fishing, hunting and catching live music. At home, he enjoys spending time with his wife, Cara, and their son, Bo, working in the garden, reading, and watching documentaries.



Stacey Berkley

Associate Vice President, Registered Client Service Associate

Stacey joined Davenport & Company in January 2017. She provides client service and integral operational support to the Valentine Ferrell team. Prior to joining the firm, she worked for four years as a Banking Associate at The Bank of Southside Virginia where she was a management trainee responsible for opening new accounts and loans.

A graduate of Crown College in Powell, Tennessee, Stacey earned her Bachelor's degree in elementary education. After college, she taught first, fifth and sixth grades for four years at Gill Grove Baptist School. Stacey is Series 7 and 66 registered.

In her free time, Stacey enjoys spending time with her family including her husband, Brad, and daughter, Blayre. She also enjoys traveling to the mountains and visiting scenic parts of Virginia.



Sarah Grammer

Client Service Associate

Sarah graduated from The University of Mary Washington in 2016, with a B.A. in Biology and English: Creative Writing, where she developed an interest in entomology. After graduating, she worked with the Virginia Department of Health as a Mosquito Biologist, and as an Epidemiology Specialist before starting as a server at Basilico New York Deli in Fredericksburg, Virginia. She worked her way up to management before leaving to join Davenport in April 2022.

Sarah applies the customer service and problem-solving skills she picked up in the service industry to her current position with the Valentine Ferrell team, ensuring their clients know they are the team's top priority.

Outside of work, Sarah enjoys spending time with her boyfriend, their dog and two cats as well as family and close friends. She holds interest in various hobbies, including but not limited to, singing, writing, painting and maintaining her own insect collection.