

Joe Thompson, CFP[®], CPA

Vice President-Investments



Joe has over a decade of experience helping clients plan, save, and invest for the future. Prior to the inception of Owen, Whelen & Thompson WM, he worked as a CPA and auditor for Deloitte and gained his CERTIFIED FINANCIAL PLANNER[®] designation while working for a boutique wealth management firm in the Florida Keys. At Davenport, Joe also served two years as a Financial Planning Associate where he spearheaded the rollout of the MoneyGuidePro financial modeling software and developed and presented financial analyses for hundreds of Davenport clients.

Joe has lived in Virginia for most of his life and met his wife, Emily (a Richmond native) when they were both 1st years at UVA. They have three young boys, Finn, River & Woods. In his free time, Joe enjoys spending time with his family, playing assorted games (board/card/video), and practicing guitar.