DAVENPORT
BUILDING WEALTH TOGETHER

901 East Cary Street Suite 1100
Richmond, VA 23219
Phone: (804) 780-2095
Toll-Free: (800) 846-6666
DolanKastenbaum@investdavenport.com

Dolan & Kastenbaum

of Davenport & Company LLC

Duke Dolan

Managing Director

Duke joined Davenport & Company in 1993, is a Managing Director, and serves on the Davenport Board of Directors. He is Series 7, 24, 63 and 65 registered with FINRA.

Duke graduated from University of Virginia with a degree in Arts & Sciences and earned an MBA from the University of Richmond. He volunteers for several youth sports associations including Tuckahoe Little League, Western Wildcat Youth Football, Rockit Sports, and is active in Godwin High School and Benedictine College Prep. He is a member and past board member of Hermitage Country Club. Duke and his wife, Lee, spend their free time supporting their three children, Henry, Mattie and Fred.

Marion Cosby Kastenbaum

First Vice President - Investments

Marion started at Davenport & Company in 2010 as a Client Service Associate and then left to join the Wealth Advisor Associate (WAA) program at Morgan Stanley. As a WAA, she gained valuable industry experience as she learned how to create financial plans and work with clients' portfolios. In 2014, she rejoined Davenport as a Financial Advisor.

Marion started her freshman year at The University of Georgia with an Equestrian scholarship and graduated from James Madison University. She is series 7 and 66 registered with FINRA and is licensed to sell long-term care insurance. Marion is an avid Equestrian and competes on the A rated circuit of the United States Equestrian Federation. She is a board member and secretary of Manakin Farms, Inc. In her free time, she and her husband, Jon, enjoy spending time with their golden retrievers, Chief and Ranger.

Securities and Advisory Services offered through Davenport & Company LLC Member: NYSE | FINRA | SIPC

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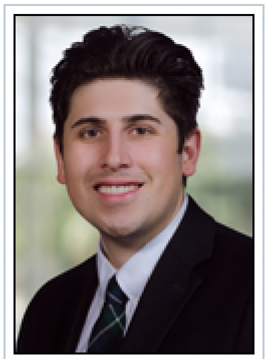

Sam Sweeney, CFP®

Associate Financial Advisor

Sam joined Davenport in November 2020 and worked in the firm's Client Services department before joining the Beadell, Dolan & Kastenbaum team in 2021. Prior to joining Davenport, he worked as an Investment Analyst at 1st Source Bank where he supported financial advisors and worked on data aggregation and performance tracking. Sam's experience also includes working as a Client Services Officer assisting with corporate bond underwriting at Fulton bank. Sam is Series 7 and 66 registered with FINRA and he is licensed to offer insurance and annuity products. He also earned and maintains the CERTIFIED FINANCIAL PLANNER® professional certification.

A graduate of Ithaca College, Sam earned a Bachelor's degree in Business Administration with a concentration in finance. He was the captain of his college ski team and competed in giant slalom and slalom ski racing. Sam's father was a financial advisor for 50 years and helped emphasize the importance of building trust with clients and doing what is right rather than what is easy.

Active in the community, Sam serves as the Finance & Fundraising Chair on the Metropolitan Business League's junior board.

A Lancaster, Pennsylvania native, Sam moved to Richmond in July 2020. In his free time, he enjoys sports, the outdoors, traveling, music, fitness, and spending time with friends and family, including his wife, Madison.

Spencer Harris

Registered Client Service Associate

Spencer joined Davenport in 2024. As a part of Dolan & Kastenbaum Wealth Management, he helps support the team with administration needs and fielding and executing client requests. Spencer graduated from Virginia Tech with a degree in Economics in 2022. While at Virginia Tech he was a member of the history honor society, Phi Alpha Theta. He is Series 7 registered with FINRA.

Outside of work, he enjoys going to concerts at local venues and playing soccer with friends. When he is not on the go, he enjoys spending time at home relaxing and watching sports.

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