

## James W. “Jim” Shearin

Managing Director



Jim has more than 30 years of experience in the finance industry. He joined Davenport & Company in 2007 after 14 years with Morgan Stanley and its predecessor Dean Witter. Jim takes pride in serving as his clients' financial gatekeeper. His previous career as a CPA provides a base of knowledge that allows him to work comprehensively with his clients and their other advisors to address wealth management issues that are important to their families and their business.

Working with the extensive resources at Davenport, Jim can help his clients manage their assets with a range of professionally managed fee-based accounts or traditional brokerage accounts. He provides access to custom portfolios and premier professional money managers and mutual funds. For clients seeking reliable income, he can build custom fixed income strategies.

Jim is active in his church and community. He currently serves on the board of directors of StepUp Ministry on the development committees and is Chair of the finance committee. He is also on the board of directors of TLC, Inc. (formerly known as The Tammy Lynn Center) also helping on the development committee.

He was on the Board of Directors for the Raleigh Durham Chapter of the Association for Corporate Growth for 17 years, where he served as president and in other executive positions on the board. He was twice Grand Knight and also Operation LAMB chair for Our Lady of Lourdes Knights of Columbus Council. He also participated on the stewardship and strategic planning committees of Our Lady of Lourdes Catholic Church and acted as Co-Chair of the Boys and Girls Club camper-ship drive. Jim is a graduate of Wake Forest University and is married with three children.

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All investing carries risk.

Jim Shearin is registered with the Financial Industry Regulatory Authority (FINRA) to offer securities and advisory services to clients who reside in Alabama, California, Colorado, Delaware, Florida, Georgia, Kansas, Kentucky, Maryland, Massachusetts, Minnesota, New York, North Carolina, Oregon, Pennsylvania, South Carolina, Texas, and Virginia. Jim is licensed to offer insurance and annuity products to residents in North Carolina, Texas and Virginia.