

Julie C. Beck, CFP®

Senior Vice President - Investments



Julie began her investment career working on the floor of the New York Stock Exchange and a Corporate Bond trading desk in New York. A native of Norfolk, she moved back home in 1985 and worked as a financial advisor with Bank of America Investments and its predecessor firms for 14 years. She then worked as a financial advisor for Legg Mason, which merged into Smith Barney, for the following 10 years. Julie was ready to get back to a regional firm that focused on taking care of its clients so she decided to move her successful financial practice to Davenport in 2009.

Julie works closely with her clients to develop and maintain an investment strategy that is focused on their financial goals and risk tolerance. Julie graduated from the University of Virginia with a BA in Economics. She holds her CERTIFIED FINANCIAL PLANNER™ professional designation. Julie is very involved in her local community. She serves on the Health System Board of Directors for the Children's Hospital of the King's Daughters (CHKD) and as a past president of The King's Daughter's board she remains very active with them. She and her husband, Ron, enjoy boating, scuba diving, pickle ball, and spending time with their five adult children and their grandchildren.