

Plan for tomorrow with wisdom and confidence.



FINANCIAL SERVICES TEAM

In addition to a personal Financial Advisor, your Financial Services Team includes dedicated CERTIFIED FINANCIAL PLANNER® professionals, insurance and annuity specialists, and experienced retirement plan professionals—all working to create a solid plan to give you more confidence in your financial future.



Davenport & Company LLC Member: NYSE | FINRA | SIPC
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For more information, visit www.investdavenport.com/financial-services

How can we help?

ANNUITIES

As a strategic long-term investment vehicle, annuities can provide significant benefits for both retirement and legacy planning including protection against outliving your money, predictable lifetime income payments, tax-deferred growth, and protection of asset value for heirs. Davenport offers both fixed and variable annuities from highly rated insurance companies providing you with reliable options to help secure your financial future.

INSURANCE

Insurance can provide peace of mind by safeguarding assets and helping to ensure that loved ones have the necessary resources to cope during difficult times. Davenport offers a complimentary review of existing life, disability and long-term care policies to confirm your insurance portfolio provides the protection you require and expect. We can also offer cost-effective solutions designed to meet your needs if existing coverage is inadequate or additional coverage is desired.

FINANCIAL PLANNING

A solid financial plan begins with understanding your unique situation. We start by listening to you, outlining your life goals, quantifying your expenses and financial resources, and assessing your investment risk tolerance. From there, we tailor an analysis to help you prepare for the future—whether that means saving for your child's education, planning for retirement, or passing on your estate.

RETIREMENT PLANS

Saving for retirement is essential for both individuals and companies. For individuals, it can help provide financial security and independence in your later years allowing you to maintain your standard of living and cover unexpected expenses. For companies, offering retirement savings plans can attract and retain talented employees demonstrating a commitment to their long-term well-being. It also can also aid in fostering a loyal and motivated workforce which can lead to increased productivity and reduced turnover.

Prioritizing retirement savings is a wise investment in the future benefiting both individuals and organizations. Our experienced team helps develop tailored solutions that meets the needs of both.

FINANCIAL SERVICES DEPARTMENT HEAD



Tammy Severt

Senior Vice President - Head of Financial Services

Tammy leads a team of accomplished professionals who support the firm's Financial Advisors with insurance and annuity products, retirement plans, cash management services, 529 Savings Plans, donor advised funds, securities-based lending, and financial planning. Tammy joined Davenport in 1998 and is Series 7, 66, 24, and 26 registered with the Financial Industry Regulatory Authority (FINRA) and licensed to sell life, health and annuity products. She holds a B.B.A. from Radford University.

FINANCIAL SERVICES TEAM SUPPORT



Marnie Slawson

Financial Services Associate

Marnie joined Davenport in 2024. She provides support for a wide range of services, including donor advised funds, financial planning and retirement services. She graduated Summa Cum Laude with a B.A. in English from Appalachian State University.



Derek Christmas

Financial Services Associate

Derek joined Davenport in 2024. He provides annuities and insurance support to the Financial Services team and the firm's Financial Advisors. He holds a degree in Finance from Virginia Tech.

DEDICATED PROFESSIONALS



Andrew "Andy" Hargroves

Vice President - Annuity Product Manager

Since joining Davenport in 2011, Andy has been a support resource for Davenport's Financial Advisors and their clients. Specializing in annuity products, Andy holds a bachelor's degree in Finance from the University of Alabama and is Series 7 and 66 registered with FINRA. Additionally, he is licensed to offer life, health, and annuity products.



Elizabeth "Lizzie" Pollard, CFP®

Senior Vice President - Insurance Specialist

Lizzie oversees individual and group life, long-term care, and disability income protection insurance sales as well as ongoing policy service. She joined Davenport in 2006 and has amassed over 25 years of industry experience. In addition to being a CERTIFIED FINANCIAL PLANNER® professional, Lizzie holds Series 7, 63, 65, and 24 registrations with FINRA and is licensed to sell life, health and annuity products. She earned both her undergraduate and graduate degrees from the University of Virginia.



Lisa Hatcher, CFP®

First Vice President - Financial Planning Product Manager

Lisa began her career in 2004 gaining experience across various financial services and wealth management firms including running her own advisory firm. In 2019, she transitioned to Davenport, bringing with her a wealth of knowledge and expertise. As a CERTIFIED FINANCIAL PLANNER® professional, she supports Financial Advisors by providing financial planning and education for their clients. Lisa earned a B.B.A. degree in finance and a master's degree in economics from Kent State University.



Tyler Clark, CFP®

Vice President - Senior Financial Planning Associate

Tyler joined Davenport in 2022, bringing with him 15 years of experience in the financial services industry. He currently serves as a financial planning resource to Davenport's Financial Advisors generating plans and facilitating the financial planning process for clients. With a deep understanding of the financial planning process, Tyler ensures that clients receive comprehensive and tailored financial advice. He earned a B.A. from LeMoyne College and is a CERTIFIED FINANCIAL PLANNER® professional.



James "Weber" Harris, CFP®

Financial Planning Associate

Weber joined Davenport in 2022. He supports Davenport's Financial Advisors by creating financial plans and guiding clients through the financial planning process. Weber holds a B.S. in Finance from Virginia Tech and is a CERTIFIED FINANCIAL PLANNER® professional.



Kimberly "Kim" Williams, CRPS®, AIF®

Senior Vice President - Retirement Services Specialist

Kim joined Davenport in 1992 and has served as a Retirement Plan Specialist since 2001. She provides essential retirement services sales and marketing support to Davenport's Financial Advisors. Kim is a Chartered Retirement Plan Specialist (CRPS), an Accredited Investment Fiduciary (AIF), and holds Series 7 and 66 registrations with FINRA. Additionally, she is an active member of the American Society of Pension Professionals and Actuaries, the National Association of Plan Advisors, and the Central Virginia Employee Benefits Council.



Risa Gomez, CRPS®, AIF®

First Vice President - Retirement Services Specialist

Risa began her career in the financial services industry in 1989 and joined Davenport in 2011. As a Retirement Plan Specialist, Risa uses her extensive experience to help clients by offering sales and marketing support to the firm's Financial Advisors. She is a Chartered Retirement Plan Specialist (CRPS), an Accredited Investment Fiduciary (AIF), and holds a Series 7 registration with FINRA.



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Annuities are long-term investments intended for retirement planning. Withdrawals of earnings and other distributions of taxable amounts are subject to ordinary income taxes, and, if taken prior to age 59½, an additional 10% premature withdrawal penalty may apply. Fees and expense for these products may be higher and the surrender period may be longer than contracts without these enhanced features and benefits. Annuity contracts may not be appropriate for some clients. You should carefully consider whether an annuity is right for you after a thorough discussion with your Financial Advisor. Certain benefits may provide reduced values at advanced ages, and insurance companies may force annuitization at a certain age. Please consider these items carefully before purchasing any annuity contract.

Individuals who open accounts after reviewing any type of financial planning analysis should consider whether to establish a brokerage account or an investment advisory account. There are important distinctions between the two types of accounts. In brief, a brokerage account is transactional in nature, and any advice provided is limited to the transaction. In an investment advisory account, the Financial Advisor will act as an investment consultant to monitor the account on an on-going basis. Clients are responsible for determining the type and level of service that is most suitable for their goals and objectives. Please consult your Financial Advisor for more information.

IRAs and other retirement plans may have fees associated with them in addition to costs associated with investing the assets of the IRA or retirement plan. These fees may include but are not limited to: annual account fees, administrative fees that may include recordkeeping of the plan, legal fees, accounting fees, etc, and termination fees. Please consult with your Financial Advisor or plan sponsor to learn more about the fees associated with a particular plan.