

Davenport & Company LLC - Corporate Giving Guidelines

Davenport & Company LLC has a long history of supporting organizations and projects in the communities where our offices are located. Davenport will continue to make contributions to our communities with a preference for organizations and projects that promote education; health and human services; culture and art; and civic and community improvement.

GUIDELINES

Davenport & Company receives many sponsorship and charitable giving requests each year from wonderful organizations providing valuable services in our communities. While we would like to be able to provide assistance to all of the entities who make our neighborhoods a better place to live and work in, as an employee-owned firm with approximately 420 associates, it is not possible to support all of them. We carefully review each sponsorship request received to ensure it is a good fit for Davenport's business, our associates and our clients.

Factors considered when reviewing sponsorship requests:

- What life enhancing services does the charitable organization provide to our community?
- Does the sponsorship provide a marketing opportunity that will benefit the firm as a whole, a regional area in which the firm operates, or an area in which one of our branch locations operates?
- Does the sponsorship provide an entertainment opportunity for Davenport clients who are represented by Financial Advisors/Portfolio Managers/Bankers of the firm?
- Does the requesting organization have an existing relationship with the firm?

Requests will be considered when accompanied by a completed Request Form, at least 90 days prior to the scheduled event. Incomplete forms may be returned to the requester for completion before the event will be considered. All requests for sponsorship funds and/or charitable giving requests should be sent with complete form to the review committee via DavenportGiving@investdavenport.com.

Davenport & Company LLC does not typically support organizations other than 501 (c)(3) nonprofits, governmental, or tribal entities.

Davenport does not generally provide support to the following:

- Capital Campaigns
- For-profit entities, including start-up businesses
- Political, labor, religious, or fraternal activities
- National initiatives (however, we do consider requests from local affiliates to branches, where appropriate)
- Individuals seeking scholarships, fellowships, or sponsors for a particular cause
- Organizations that have been operating less than two years

Volunteer events are the responsibility of Davenport Shares. Support of volunteer events will be at the discretion of the Davenport Shares Committee and will not involve any financial commitment on the part of Davenport & Company LLC. For more information about Davenport Shares, please contact DavenportVolunteers@investdavenport.com.