

'Unleash the Possibilities of Your Assets'

Connecticut
Financial

Davenport & Associates

You've been working hard for years, amassing considerable assets along the way. At long last it's time to slow down, relax and put those assets to work for you.

"Most people don't realize that maximizing the benefits of their assets is a completely different art form," says John F. Davenport, Esq., President of wealth planning firm Davenport & Associates.

The Norwalk-based firm has used its trademarked "Wealth Maximization Method"™ to help hundreds of affluent retirees maximize their incomes and the tax-free wealth they leave to their heirs, while allowing them to direct any taxes to support the causes of their choice.

"We're passionate about helping people plan their retirement, protect their assets, and enjoy more certainty and peace of mind than they've ever enjoyed in their financial lives," says Davenport, a practicing tax attorney in Connecticut and New York and a fully licensed securities broker and insurance agent.

The process typically starts at an elegant dinner meeting and presentation for a few select couples, and continues with a complimentary consultation at Davenport & Associates' offices. Then, couples who choose to become members of one of the firm's trademarked programs participate in a series of meetings at the firm over the next six to eight weeks, with the aim of understanding unique wealth planning strategies to address their unique estate and investment needs.

"We show our clients how they can enjoy more benefit and satisfaction from every asset they own, and at a far earlier age than they would ever have thought possible," Davenport says. "We also show them how they can transfer more wealth from their assets than they thought was possible."

The firm enjoys a comprehensive relationship with each of its 450 clients, Davenport says. He and his team of attorneys, planners and accountants take responsibility for everything from investment management to estate and tax planning, insurance and long-term care planning. The firm is happy to work with clients' outside professionals, such as accountants or lawyers, as needed.

Avoiding Unnecessary Risk and Taxes

Davenport stresses that his firm has no interest in selling "the hot stock of the day." Rather, it seeks to show clients how



Davenport & Associates, John F. Davenport, Esq., President

to position and use assets in retirement to maximize and protect their retirement income while providing more tax free wealth to their heirs. "I don't want my clients to have to worry about the day-to-day fluctuations in the market, or about ultimately giving too much of their assets to Uncle Sam," he explains.

As an independent firm, Davenport & Associates can offer clients virtually any financial or insurance product on the market, with access to the best financial professionals in the country. Still, specific financial and insurance products are not mentioned during the planning period. Instead, the focus is on helping clients understand "what their rights and options are for making the most of what they have worked so hard for – first for themselves and then for their heirs," Davenport says.

"Davenport & Associates' unique approach to wealth planning is not the only thing that sets it apart from any other firm in the marketplace. Starting with the introductory dinner at a high-end restaurant, and continuing every time a client enters our door, we envelop them in what I like to call a 'Ritz Carlton experience,'" Davenport explains.

A Ritz Carlton experience and a chance to take advantage of options you may not know about to make the most of what you've worked so hard for. "Your assets can do much more for you than you ever imagined," Davenport says. "And you need not sacrifice security for the freedom to enjoy your future."



Davenport and Associates

800 Connecticut Avenue, Suite E401 | Norwalk, CT 06854
203-953-6300 | Toll free: 888-525-7734 | www.fjdavenport.com