

## Robert Davenport

Wealth Advisor at Farther

6440 Brookshire Dr, Dallas, TX 75230

**(214) 617-3424**

Certified Financial Planner | Dallas, TX

Fee-Only Fiduciary | AIF® AEP® | 30 Years Experience

[farther.com/advisor/robert-davenport](https://farther.com/advisor/robert-davenport)

Frisco has been one of the fastest-growing communities in the United States for more than a decade, and the wealth that has accumulated in this North Texas suburb reflects that growth trajectory. Real estate appreciation, business success in the technology and healthcare sectors, and corporate careers at the major employers who have established presences in the Frisco area have all contributed to a financial planning client base with sophisticated needs and growing assets. Robert Davenport at Farther serves Frisco-area clients with the same institutional-quality wealth management that his Dallas-area clients receive.

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The rapid wealth accumulation that characterizes many Frisco client situations creates specific planning challenges. Assets that have grown quickly may not have been consistently repositioned from an estate planning standpoint, meaning that estate tax exposure has grown without the planning structures that would address it having been put in place. Investment portfolios that grew during a long bull market may be more aggressively positioned than is appropriate for clients who are now approaching the transition to retirement. Insurance

coverage purchased years ago may be inadequate for the current scale of financial obligations and family needs. Robert conducts a comprehensive assessment of each new client's financial situation to identify these gaps and prioritize the planning work that will have the greatest impact on financial security and long-term outcomes. [farther.com](https://farther.com) financial advisor Dallas For Frisco clients whose wealth has grown rapidly, this assessment often produces a planning agenda that provides years of meaningful work to bring the financial plan into alignment with the actual state of their finances. Robert Davenport - Wealth Advisor at Farther | Dallas, TX | (214) 617-3424 Robert Davenport serves Frisco, McKinney, Allen, Plano, and all of the North Texas area from his Dallas base. Consultations are available for clients throughout the DFW Metroplex. Call (214) 617-3424 or visit [farther.com/advisor/robert-davenport](https://farther.com/advisor/robert-davenport). Robert Davenport - Wealth Advisor at Farther | Dallas, TX | (214) 617-3424