

**Richard Davenport**  
**Lakeshore Financial Planning Inc.**

**23201 Jefferson Ave  
Saint Clair Shores, MI 48080**

**Telephone: 586-498-0788**

**January 15, 2021**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Richard Davenport that supplements the Lakeshore Financial Planning Inc. brochure. You should have received a copy of that brochure. Contact us at 586-498-0788 if you did not receive Lakeshore Financial Planning Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Richard Davenport (CRD # 3026532) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### Richard Davenport

*Year of Birth:* 1958

#### *Formal Education After High School:*

- Wayne State University, BS Business Administration/Finance, 8/1981
- Oakland University, Certificate in Financial Planning, 2/1996

#### *Business Background:*

- Lakeshore Financial Planning Inc., Vice President/ Investment Adviser Representative , 10/2018- Present
- Twiddy and Associates, Advisor, 07/2007-01/2012

## Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Richard Davenport has no required disclosures under this item.

## Item 4 Other Business Activities

Richard Davenport currently has no outside business activities.

## Item 5 Additional Compensation

Mr. Davenport does not receive additional compensation beyond that received as an Investment Advisor Representative of Lakeshore Financial Planning, Inc.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of Lakeshore Financial Planning Inc.'s firm brochure for additional disclosures on this topic.

## Item 6 Supervision

In the supervision of our associated persons, advice provided is limited based on the restrictions set by Lakeshore Financial Planning Inc., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Patricia Johnson, Chief Compliance Officer

Supervisor phone number: 586-498-0788