DVI

DAVID VAUGHAN INVESTMENTS

Relationship Manager/Wealth Advisor

Peoria, Illinois

Who We Are

David Vaughan Investments, LLC (DVI) is proud of its Associates. We are an exceptional team of investment professionals who are bright, creative, hardworking, and have a passion for what we do. Every day we focus on serving our valued clients' best interests, and it is all accomplished within a team-based approach where mutual respect and integrity serve at its core.

Who We Want

DVI is currently looking for an experienced **Relationship Manager/Wealth Advisor** to join the team and provide skill and thought leadership to a select group of our clients. In this critical role, your primary responsibility will be to serve the client's needs, goals, and objectives and deliver a comprehensive wealth management experience in tandem with the input of DVI's team of subject matter specialists.

Qualifications

+ Bachelor's Degree.
+ Either Series 7, 66 or 65 are required prior to hire.
+ Certified Financial Planner® (CFP®) and/or Chartered Financial Analyst® (CFA®) designation.
+ 5-8 years of applicable professional experience.
+ Exhibit a fiduciary mindset, always doing what is right for the client and maintaining confidentiality in all matters.
+ Entrepreneurial spirit and willingness to participate in business development initiatives.

What to Expect

+ Oversee client relationships and lead client meetings to identify complex issues and offer creative solutions to help clients achieve their financial goals.
+ Collaborate with the portfolio management team to identify the appropriate DVI investment strategy that is in alignment with the client's stated goals, investment objectives and risk tolerances.
+ Participate in prospective client meetings, identify additional opportunities to serve our existing client base and generate referrals from both existing clients and centers of influence.
+ Communicate with the client a comprehensive understanding of financial market activity, current events and other topical issues and how they impact and or influence DVI's investment strategy.

About David Vaughan Investments

DVI is a team of 44 experienced investment professionals that provide asset management services and wealth management solutions to both high-net-worth individuals and institutional investors. For over 46 years, DVI has employed a *Quiet Quality* approach to investment management: people of integrity, acting solely in their clients' best interests. Currently, we have over 1,500* clients, and approximately $5.3 billion* in Assets Under Advisement through our offices in Peoria, Illinois, and Winter Park, Florida. In the fall of 2017, DVI formed a partnership with Morton Community Bank, creating one of the largest privately held financial institutions in downstate Illinois.

*As of 3.31.2024

At DVI, we strive to provide a working environment that is attractive to our entire team. Consistent with our long-term client focus, we aim to attract and retain the best Associates possible, and our benefits program is instrumental in this goal. We provide industry-competitive salaries and significant incentive plan opportunities, a generous profit sharing 401(k) retirement plan, health insurance, life insurance, short-term and long-term disability programs, and work-from-home and paid-time-off programs. In addition, partnership status among our very top performers is also a realistic consideration.

If you appreciate a work environment that truly lives its values, please consider DVI as an employer that consistently provides *Quiet Quality.*