DVI

DAVID VAUGHAN INVESTMENTS

Senior Relationship Manager

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 **Senior Relationship Manger (SRM)** to join the team and provide immediate positive service to our clients. The SRM must build trust with clients and effectively manage relationships with our Portfolio Managers and Strategic Advisors to deliver a complete wealth management solution that serves the client's needs, goals, and objectives. The SRM will have supervisory responsibilities overseeing both Relationship Manager(s) (RM) and Assistant Relationship Manager(s) (ARM).

Qualifications

+ Bachelor's degree (graduate or advanced degree preferred).
+ Certified Financial Planner® (CFP®) Designation or Chartered Financial Analyst® (CFA®) Designation.
+ Minimum of 10-15 years of applicable professional experience.
+ Exhibit a fiduciary mindset, always doing what is right for the client and maintaining confidentiality in all matters.
+ Strong visionary leadership, time management, and change management skills.
+ Entrepreneurial spirit with a willingness to participate in business development initiatives.

What to Expect

+ Directly supervise Associates in the Relationship Management department including interviewing, career development & appraising performance.
+ 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 aligns 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 want 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 incentive plan opportunities, a generous profit sharing 401(k) plan, health insurance, life insurance, short-term and long-term disability programs, 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.*