



Shane Higgins CFP® Joins David Vaughan Investments as Relationship Manager

August 2024

Winter Park, Florida, and Peoria, Illinois

David Vaughan Investments, LLC (DVI) announces that Shane P. Higgins (CFP®) has joined the firm as a Relationship Manager based in Winter Park, Florida. With more than a decade of experience in the wealth management industry, Shane brings both professional acumen and a demonstrated commitment to providing responsive client service. Shane's previous employers include Merrill Lynch, TD Ameritrade, and, most recently, Charles Schwab, where he was a Senior Manager in Wealth Advising, a leadership position that included consulting responsibilities and practice management implementation among a team of wealth advisors.

Shane's unwavering dedication to upholding fiduciary responsibilities is the cornerstone of his professionalism, fostering prosperous, long-term client relationships. "Shane is a great addition to our Winter Park team," noted Patrick Smarjesse, Senior Vice President and Partner. "He is a seasoned veteran in the wealth management profession, fits well within our 'Client First' culture, and has developed strong financial planning skills that will prove to be an asset to our growing client base in Central Florida."

Shane holds both a B.S. in Criminology from Florida State University and a B.S. in Finance from FSU's College of Business.

About David Vaughan Investments, LLC

DVI is an investment advisory firm with locations in Peoria, Illinois, and Winter Park, Florida. As of July 31, 2024, DVI had total assets under advisement of \$5.4 billion. In the fall of 2017, DVI established a partnership with independently owned Hometown Community Bancorp, headquartered in Central Illinois.

Since 1977, DVI has provided superior asset management services and wealth management solutions to high-net-worth individuals and institutional investors. DVI employs a *Quiet Quality* approach to investment management. DVI Associates are people of integrity, acting in their clients' best interests and helping them plan for the future, protect what they've worked so hard to attain, and prosper today and for generations to come. For more information visit www.dviinc.com.

Source: David Vaughan Investments, LLC

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