



# Financial Advisor 100

## **CNBC Names DVI to Financial Advisor 100 List for Sixth Consecutive Year (2019-2024)**

October 2024

*Peoria, Illinois, and Winter Park, Florida*

For the sixth year in a row, DVI has earned a spot on CNBC's Financial Advisor 100, ranking as the top firm headquartered in Illinois. The CNBC FA 100 recognizes firms that offer more than just portfolio management, highlighting those that assist clients with all aspects of their financial well-being. This honor emphasizes the value of trust in the advisor-client relationship.

Only 2% of the 40,896 registered investment advisory (RIA) firms in the SEC database met CNBC's initial ranking criteria. The ranking process narrowed that list to the top 100 by evaluating various criteria including years in business, the number of Certified Financial Planners (CFP®) on staff, services offered, and the percentage of discretionary assets managed.

"While we are always grateful to be recognized by CNBC, we understand the competitive nature of the RIA industry demands our continued focus; we simply cannot rest on our laurels," said DVI President & CEO Will Williams. "Our clients rely on us for their financial peace of mind, and we must not lose sight of DVI's responsibility to deliver that outcome day-in and day-out."

*This rating is not indicative of DVI's future performance. The analysis for the CNBC FA 100 rating was conducted by CNBC with the assistance of AccuPoint Solutions, and neither the participating firms nor their employees pay a fee in exchange for inclusion in it. For more information regarding the CNBC FA 100, including the methodology and how the firms were selected, visit <https://www.cnbc.com/2024/10/02/cnbc-fa-100-ranking-methodology.html>.*