

Assistant 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 **Assistant Relationship Manager** to join the team and provide immediate positive service to our clients. In this critical role, you will have the primary responsibility for working in tandem with DVI's Relationship Manager(s) to provide a superior overall client experience to clients.

The Assistant Relationship Manager will also work closely with other DVI associates to facilitate the completion of tasks derived from ongoing interaction with the Relationship Manager(s) or direct contact with DVI clients.

Qualifications

- + Bachelor's Degree (advanced degree preferred)
- + Minimum of 3 years of relevant professional experience
- + Transferable experience in Banking, Law, Insurance, Sales, Marketing, Consulting or Finance is preferred
- + Must have Series 65 or Series 7 license/certification. In addition, progress towards Certified Financial Planner® designation is desirable.

What to Expect

- + Initiate, participate and prepare for client meetings with assigned Relationship Manager(s) and Portfolio Manager(s). Engage in meeting follow-up.
- + Document client requests and completion of activities in customer relationship management and portfolio accounting systems.
- + Engage in ongoing, proactive communications with client and other professionals unique to the relationship.
- + Maintain a high level of understanding of current investment topics, tax law updates, qualified plan contribution limits and general economic developments.
- + Meet with assigned Relationship Manager(s) on an ongoing basis to review status of outstanding tasks and calendar of upcoming events. Spearhead the effort to increase formal client contacts throughout the year.
- + Leverage internal and external resources in conjunction with the assigned Relationship Manager(s) to achieve client objectives.

About David Vaughan Investments

DVI is a team of 41 experienced investment professionals that provide asset management services and wealth management solutions to both high-net-worth individuals and institutional investors. For over 45 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 1,300 clients, and approximately \$4.5 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.

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*.