DVI

David Vaughan Investments

Sustained Growth, Enduring discipline

2025 Year in Review

Key Indicators

48 Years
As an SEC-registered investment advisor

$6.0+ Billion
Assets Under Advisement (AUA)

9.7%
annualized AUA growth over five years

1,270 Clients in 38 States

45.1%
of client relationships exceed 10 years

98.5%
client retention rate

38.2%
growth in our Associate team since 2020

47 Associates
with over 400 years of cumulative industry experience

9 Members
of the Board of Managers