A Quiet Quality

Approach to Investment Management

Independently United

DVI partners with Morton Community Bank

To learn more, visit DVIandMCB.com (http://dviandmcb.com)

WHO WE ARE

Our Story (/our-story)

Founded in 1977 by David J. Vaughan, DVI has since grown into one of the larger independently owned investment advisory firms in the country. Follow the Our Story link above to read more about our journey and the philosophies that steer our course. Click here to watch our (https://www.dviinc.com/our-story)40th Anniversary Retrospective video. (https://www.dviinc.com/our-story)

Our Team (/groups)

“The DVI Associates are the real success story of David Vaughan Investments. They work as a team and labor solely for the benefit of our clients. I am pleased and honored that they wish to carry on the tradition of DVI value investing that I began so many years ago." David J. Vaughan, Founder.
Visit the Our Team page to meet our Associates and Board.

Career Opportunities (/career-opportunities)

At David Vaughan Investments, LLC, we are an exceptional team of people who are bright, creative, courageous, and have a passion for what we do every day. If you appreciate a work environment that truly reflects its values every day, please review our Open Opportunities and consider DVI as an employer and a great place to forge a career.

WHAT WE DO

Our Approach (/our-approach)

Our goal is to achieve simplification for our clients. Whether the client is a high net worth individual or a sophisticated institution, it really all comes down to identifying what is important, developing a plan to reach those goals and creating understandable reports to measure progress against those objectives.

Our Process (/our-process)

Building and implementing an investment plan is just the beginning of our commitment to service. The DVI team works closely with each client to monitor their investment performance and wealth management needs, making the ongoing changes necessary to ensure the attainment of their long term goals.

Our Strategies (/our-strategies)

It is impossible to determine one asset allocation that would be appropriate for all our clients. Every one of the individuals, families, and organizations we are fortunate enough to list as clients have unique circumstances that dictate a portfolio that is appropriate for them. Visit the Our Strategies page to learn more about our Equity, Balanced and Fixed Income Strategies and see if one may be right for you.

WHO WE SERVE

Our Clients (/current-clients)

Our business is personal and we want to keep it that way. Our client growth is more of an indication that we have done a few things very well and the marketplace has been receptive to our willingness to do things differently, as we say “Daring to be Different.” We got here the old fashioned way: sticking to our knitting, working hard, willing to be innovative and keenly focusing on our clients’ needs.

Prospective Clients (/prospective-clients-individuals)

Are you a high net worth individual or part of an institution looking for financial guidance? Go to our Prospective Clients pages to learn more about DVI and see if we are right for you.

DVI in the Community (/community)

A big part of DVI's culture is a commitment towards giving back, a legacy left to us by DVI's founder. In addition to our annual fall fundraiser to benefit South Side Mission, countless hours of volunteer time are committed by the Associates of DVI to a number of worthy charities.

Let Us Help You Plan for Your Future Today.

Contact Us (/contact)

Latest News and Publications

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Quarterly Perspective - Vol. 26 No. 2 (/blog/quarterly-perspective-vol-26-no-2)

Spring 2019

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Recession Rumblings *Brian Christensen, CFA*
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Peoria Office
5823 N. Forest Park Drive
Peoria, IL 61614-3500
P: 309-685-0033
F: 309-685-3665

E: **dvi@dviinc.com (mailto:dvi@dviinc.com)**

Map
(https://www.google.com/maps/place/David+Vaughan+Investments+Inc/@40.7581873,-89.5742405,15

Florida Office

399 Carolina Avenue, Suite 110
Winter Park, FL 32789-3150
P: 407-622-5133
F: 407-622-5135
E: **dvi@dviinc.com (mailto:dvi@dviinc.com)**

Map
(https://www.google.com/maps/place/399+Carolina+Ave,+Winter+Park,+FL+32789/@28.5989756,-81.3
81.3545553)

Email Us

Name

email@example.com

Message

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David Vaughan Investments, LLC is registered with the Securities and Exchange Commission under the Investment Advisers Act of 1940. DVI was established in 1977 as a sole proprietorship, restructured into an S Corporation in 1991, and recently merged into a new Delaware LLC in September of 2017. The information provided on the DVI web site is intended solely for the purpose of supplying general background information on the firm and the investment counseling services it provides. DVI does not use this resource as a means of facilitating securities transactions or providing personalized investment advice. DVI and its representatives may only conduct business in those states which it has met all regulatory requirements. Therefore, no follow-up will be made by the firm with a prospective client until DVI's compliance officer has reviewed the regulatory consequences of soliciting new business within that state.