

# Investment Advisory Analyst

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 **Investment Advisory Analyst** to join the team and provide support in investment research including specific industry, sector and company analysis, performance analysis and investment strategy development. This associate will also support portfolio managers in report preparation and other projects to broaden the analyst's knowledge of the business.

## Required Qualifications

- + Bachelor's Degree from a four-year college or university; preferably in finance, business, accounting or marketing with at least a 3.0 GPA on a 4.0 scale.
- + Ability to read, analyze, and interpret common professional journals, technical procedures, regulations, financial reports, and legal documents.
- + Ability to write reports, procedures, articles, memos and correspondence that are clear and conform to prescribed style and format.
- + Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists.

## Desired Qualifications

- + MBA
- + Chartered Financial Analyst® (CFA®) and/or Certified Financial Planner® (CFP®) designations or willingness to achieve while employed.

## What to Expect

### *Investment Research & Portfolio Management:*

- + Investment Research – Participate in quantitative investment research and development initiatives.
- + Participate in the development and administration of market performance, market activity and company/security reports and analyses, and participate in and present findings to the Investment Committee as requested.
- + Participate in the development of investment research-related reports and analyses for client meetings as well as management and the Board of Directors.
- + Assist the Portfolio Management team in the development and assignment of trades within the trade order management system, in accordance with client investment mandates.

## About David Vaughan Investments

DVI is a team of 42 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 1,400 clients, and approximately \$4.8 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*.

# DVI

DAVID VAUGHAN INVESTMENTS

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Peoria, Illinois

*Continued*

### *Relationship Management:*

- + Gather relevant financial data and prepare comprehensive reports for use in prospective client meetings; update the CRM database as needed for the on-going tracking of the prospective relationship.
- + Support all preparation for client meetings including the administration, review and analysis of supporting financial information and documents, the development of client checklists, presentations, reporting packages and follow-up.
- + Maintain an understanding of financial planning concepts as well as the financial planning software utilized by DVI.

David Vaughan Investments, LLC is an Equal Employment Opportunity Employer

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