

# Steady Success

2021 Year in Review

**DVI**  
DAVID VAUGHAN INVESTMENTS

## BUSINESS RELIABILITY

45  
Years of  
Continuity &  
Commitment  
to Clients

38  
Employees

Registered under the SEC  
Since 1977

Average Tenure of Client  
Facing-Employees (Years)

15  
All  
Employees

27  
Senior  
Partners



94%

Employee Retention  
Rate in 2021

12

Consecutive Years of Improving  
Financial Results

## FINANCIAL SUSTAINABILITY

4.63B

AUA \$s in 2021

VS.

3.77B

AUA \$s in 2020



204M

Net New Assets  
in 2021



Proudly Serving Clients in

35

States

## OUR CLIENT RELATIONSHIPS

98.37%

2021 Client  
Retention Rate

1,285

Households for which  
We Serve as a Fiduciary

### DVI Client Profile

67%

Individuals/Families

17%

Institutional Clients

14%

Consulting