

Strengthening our Foundations

2022 Year in Review

DVI
DAVID VAUGHAN INVESTMENTS

BUILDING A SUSTAINABLE FIRM



45
Years Track Record

41
Associates

9
Partners



97.3%
Associate Retention Rate



2
Offices



4.86B

Banking Assets (\$) of Strategic Partner¹

¹ Total Assets of Morton Community Bank as of December 31, 2022

ACHIEVING INDUSTRY RECOGNITION

<https://www.cnbc.com/2022/10/04/heres-how-we-determine-the-fa-100-ranking-for-2022.html>



Financial Advisors

Top 100: (2019-2022)

CONTINUING A CLIENT FIRST CULTURE

4.51B

Assets under Advisement as of 12.31.2022



148.1M

Net New Assets



98.94%
Client Retention Rate

1,118
Clients

Servicing Clients in **35** States

16 YEARS

Average Tenure of Client Facing Associates

