

# A CULTURE OF CONTINUOUS IMPROVEMENT

2023 Year in Review

## KEY INDICATORS

**1977**

46 Years Operating  
as an SEC Registered  
Investment Advisor

**9**

Partners

**45**

Associates

**\$4.9 bln**

Assets under  
Advisement

**12.2%**

Assets under Advisement  
5-Year Annual Growth

**1,154**

Clients

**36.6%**

of DVI Clients Served  
for More than **10** Years

**98.2%**

Client Retention

Servicing Clients in



States

## GIVING BACK TO THE COMMUNITY

**19**

Non-Profit Board  
Participations

**35**

Organizations  
Financially Supported

**DVI** CHARITABLE  
FOUNDATION

DVI Charitable  
Foundation Created

**72%**

Associates  
Volunteering