

## **Michael Armistead Joins David Vaughan Investments as Florida Office Relationship Manager**

*Peoria, IL and Winter Park, FL – July 22, 2022*

David Vaughan Investments, LLC (DVI) is pleased to announce that Michael Armistead has recently joined the organization as a Relationship Manager in our Winter Park, FL office.

Drawing on more than a decade of experience with Charles Schwab & Co.—most recently serving as a Private Client Advisor to affluent clients—Michael brings with him strong expertise in the design, implementation and oversight of goals-based wealth management plans for more than \$350 million of client assets.

“Michael’s ability to solve complex investment, tax and estate planning issues are a wonderful addition to DVI,” notes Brian Christensen, Senior VP and Partner. “His professional credentials as a Certified Financial Planner (CFP®) and Certified Wealth Strategist (CWS®), add valuable depth to our team of experienced and capable investment professionals.”

Michael holds a bachelor’s degree from Flagler College (where he also played baseball) and earned his MBA from the University of Central Florida.

### **About David Vaughan Investments, LLC**

DVI is an investment advisory firm with locations in Peoria, Illinois and Winter Park, Florida. As of June 30, 2022, DVI had total assets under advisement of \$4.2 billion. In the fall of 2017, DVI established a new partnership with Morton Community Bank, a \$4.9 billion independently owned community bank headquartered in Central Illinois.

For the past 45 years, DVI has provided superior asset management services and wealth management solutions to high-net-worth individual and institutional investors. DVI employs a ‘Quiet Quality’ approach to investment management—people of integrity, acting in their clients’ best interests; helping them plan for the future, protect what they’ve worked so hard to attain, and prosper today and for generations to come. For more information visit [www.dviinc.com](http://www.dviinc.com).

*SOURCE: David Vaughan Investments, LLC*

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