

Net Gains:

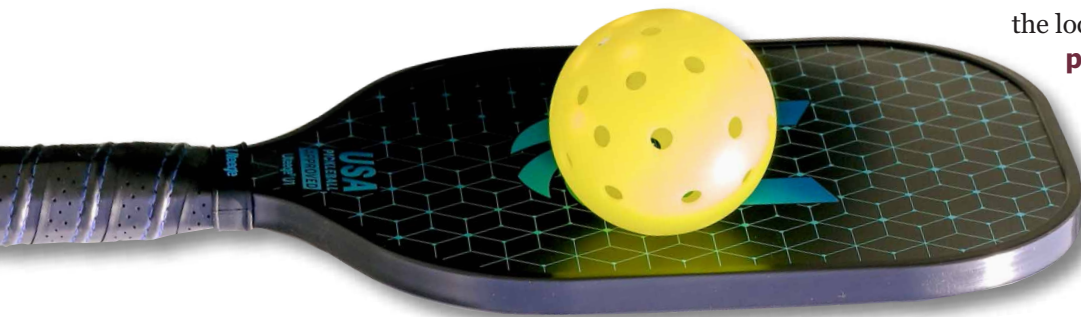
DVI's 2023 Corporate Pickleball Challenge Aces Giving Back

On Saturday, August 26th, twenty-three teams from local corporations, non-profits, and foundations gathered on the courts for the fifth annual DVI Corporate Challenge. Participants showcased impressive pickleball skills and sportsmanship throughout the event, which was hosted at the Country Club of Peoria and proceeded without a hitch despite early morning rain showers.

This year's DVI Corporate Challenge also proved to be a meaningful display of corporate philanthropy and community engagement: **\$55,000 in net proceeds will be donated to Peoria's South Side Mission's youth programs**, which include academic tutoring, life skills classes like American Sign Language (ASL), and cooking classes. South Side Mission empowers and supports the personal growth and development of young people, enabling them to thrive in the community as adults.

Organizers Glenn Maxey, Dalton Mellon, and Zack Morgenstern would like to express their gratitude to all former and current sponsors for their enthusiasm for this event and their generous support for the local community. **To date,**

participants in the DVI Corporate Challenge have contributed over \$300,000 to the South Side Mission, and David Vaughan Investments is proud of this enduring partnership with such an essential community organization.



- 1st Place:** OSF Healthcare Foundation (holding trophy)
- 2nd Place:** Pekin Insurance (blue shirts)
- 3rd Place:** Widmer Interiors (red shirts)
- 4th Place:** David Vaughan Investments (white shirts)

DVI Welcomes Chris Kent, Advisory Analyst



Chris has this to say about joining the firm: “The DVI environment strikes a unique balance. On the one hand, every Associate is highly accomplished and driven, yet there’s a strong culture of collaboration. I truly appreciate how Associates embody ‘The DVI Way’ in their commitment to each client.”

Chris Kent joined DVI as an Advisory Analyst in August and is primarily based at our Winter Park office. If Chris’s name and face seem familiar, it’s likely because he completed a summer internship with DVI in 2022. We are excited to welcome him back as a full-time Associate on our Investment Management team.

Chris graduated summa cum laude from Stetson University (FL) in May, earning a Bachelor of Business Administration degree with a double major in Investment Finance and Economics, along with a minor in Accounting. Among his impressive achievements, Chris served as the Chief Investment Officer for Stetson’s renowned Roland George Investment Program, a standout experience during his time in college. He expresses deep admiration for the program’s commitment to excellence, a quality he also finds in DVI’s rich history and stellar reputation.

As an Advisory Analyst, Chris has several key responsibilities. These include conducting investment research, analyzing market performance, and presenting findings to the Investment Committee. He will also manage client portfolios and use investment tools to create client reports. Chris will have the opportunity to collaborate with other departments, including Relationship Management, Investment Accounting, and Compliance, which will give him insight into how the firm’s processes work together to provide comprehensive client service.

Chris is diligently preparing for the CFA exam, but when he’s not immersed in studying, he dedicates time to weightlifting and enjoys all realms of World War II history.

DVI continues to build our team, and we are always on the lookout for talented investment professionals. To view our open positions or learn more about careers at DVI, we invite you to scan the QR code or visit www.dviinc.com/join-team.



Introducing DVI Video Content

We are thrilled to announce the launch of our new video series on dviinc.com, an initiative undertaken to enhance the DVI client experience by:

- **Increasing our visibility** and extending the reach of DVI to the broader community.
- **Emphasizing our distinctive position** in the wealth management landscape: “The DVI Way.”
- **Deepening our personal connections** with current and prospective clients.

The initial content release features 18 short videos, now integrated into the bio pages of our client-facing Associates. To view these videos, select the “Teams” menu at the top of our website and select your Relationship or Portfolio Manager based in Peoria or Winter Park.

As part of our ongoing commitment to enhancing the DVI experience, we look forward to sharing additional engaging and informative video content in the coming weeks.

