

InnerView

A Look Inside **DVI**

Our Associates are the heart of DVI: Please welcome our newest colleagues and share in some exciting news from our Relationship Management team.

Michael Armistead

Bringing more than a decade of robust financial services experience, Michael joined the DVI Winter Park office as a Relationship Manager in the summer of 2022.

Accountability and responsiveness are hallmarks of Michael's relationships with clients and colleagues, and he embodies the DVI approach to financial planning based on mutual trust between clients and the firm. Michael holds a bachelor's degree in business administration from Flagler

College (St. Augustine, FL) and an M.B.A. from the University of Central Florida. A lifelong Floridian, he enjoys spending time with his wife and their golden retriever and takes full advantage of as many beach outings and sporting events as he can. Michael also enjoys reading and recently finished *Power Failure: The Rise and Fall of an American Icon* and recommends it to anyone who wants a riveting history of General Electric.



Paige Sweet

After sixteen years away, Paige returned to Peoria, her beloved hometown, and joined DVI as a Client Services Associate in the summer of 2022. Her daily work at DVI has been a pivot from her previous positions in private school teaching, administration, and admissions, but she believes these experiences dovetail with "the DVI way" of ensuring that all clients experience "quiet

quality" and comprehensive care in every interaction. Paige holds a B.A. in English and Secondary Education from DePaul University and an M.A. in English Literature and Letters from Middlebury College (Middlebury, VT). She lives in Peoria Heights and enjoys playing golf and tennis, losing to her parents in euchre, and reading voraciously.



Sonia Williams

Sonia is the most recent associate to join DVI as an Administrative Client Services Associate in the Winter Park office. From working as a line cook, to many years in the non-profit sector, to her more recent transition to the wealth management industry, Sonia approaches her work with meticulous attention to detail

and an uncanny ability to take all challenges in stride. She is a proud TV binge watcher (and recommends *The Walking Dead* and *Ozark*) and loves to watch professional bull riding tournaments. She takes full advantage of the Epcot theme park and fills her down time with music, reading, and solving puzzles.



Congratulations to Zack Morgenstern!

Diligence and hard work paid off when Zack passed the strenuous Certified Financial Planner® (CFP®) exam in March 2023. Perhaps most notable: Zack sat for this exam just days after he and his wife welcomed their newest child to

the family! He adds this impressive accreditation to a long list of others, including both the Series 7 and 66, insurance licenses, and a B.A. in Accounting and Finance from Augustana College (Rock Island, IL).



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