

Celebrating our Next Generation of Leaders

We are proud to announce the promotion of several outstanding professionals to Partner and Associate Partner at DVI. These individuals have demonstrated exceptional leadership, expertise, and dedication to serving our clients with excellence. Their contributions have been integral to our firm's continued success, and each will play an important role in DVI's commitment to maintaining a firm "Built to Last."

Congratulations to our 2025 class of new DVI Partners. Their success has contributed to—and reflects—our ongoing focus on building a team of people who are passionate about delivering exceptional results and making a positive impact on the financial lives of our clients.



Mitch Zippay, CPA
Partner
Senior Accounting Manager

Since joining DVI in 2019, Mitch has played a pivotal role in strengthening our financial operations, bringing deep expertise in financial reporting, budgeting, and profitability analysis. His ability to distill complex financial data into clear, actionable insights has been key to supporting the firm's overall decision-making processes and strategy.

A proven leader, Mitch co-led the 2024 business segment analysis, refined internal accounting policies, and continues to optimize financial management processes to enhance DVI's accuracy and efficiency. His attention to detail and ability to forecast financial outcomes with precision contribute to the firm's stability and position DVI for continued success.

Beth Salmon, Vice President of Operations and Partner, remarks, "Mitch's admission to partnership is a testament to his hard work, expertise, and commitment to excellence. His journey from Accounting Manager to Partner exemplifies DVI's commitment to recognizing and rewarding outstanding talent. We wish Mitch continued success."



Mike Flaherty, CFP®
Associate Partner
Senior Relationship Manager

Mike has been an invaluable asset to DVI since 2018; his leadership and expertise in financial planning have elevated the firm's ability to provide thoughtful and innovative financial solutions for our clients. Additionally, he is responsible for developing our Assistant Relationship Manager team, ensuring DVI maintains a strong pipeline of promising investment professionals to support the firm's continued growth.

Committed to fostering a collaborative culture across all functional areas of DVI, Mike has led initiatives such as the Associate Survey to enhance employee satisfaction and has played a major role in coordinating DVI's efforts to ensure a smooth transition for Senior Relationship Managers. His dedication to continuous improvement makes him an essential resource as we prepare for DVI's future.

"Mike's responsibilities have expanded significantly over the past few years, and he approaches each challenge we've asked him to tackle with enthusiasm and persistence," notes Pat Smarjesse, Senior Vice President and Partner. "His promotion to Associate Partner is well-deserved—a natural progression as he emerges as one of DVI's future leaders."



Pierce Timko, CFA, CFP®
Associate Partner
Senior Portfolio Manager

Pierce has been a cornerstone of the DVI Investment Committee for nearly a decade, and his deep understanding of the Healthcare and Technology sectors contribute to the success of DVI's equity and balanced investment strategies. His role as a Senior Portfolio Manager based in our Winter Park, Florida, office has been instrumental in enhancing our client experience and driving overall success in the Florida marketplace. Pierce's strong relationship with Stetson University's Roland George Investment Program has cultivated a recruiting pipeline of top-tier interns and recent graduates, helping to attract and retain the next generation of investment professionals at DVI. His ongoing dedication to continuing education and professional development continues to benefit both DVI's team and clients.

"Pierce holds the unique distinction of being the only DVI Associate to have achieved both the CFA and CFP® designations," says Brian Christensen, Senior Vice President and Partner. "Whether he is uncovering new companies for the Investment Committee to consider or guiding clients through their financial plans, Pierce's deep analytical skills have proven valuable to our clients."

Check Deposits at Charles Schwab

To ensure smooth check deposits at Charles Schwab, please follow these best practices when writing checks. For questions, please call DVI at (309) 685-0033 and our Client Services team will be happy to help.

Schwab will not accept checks made payable to DVI.



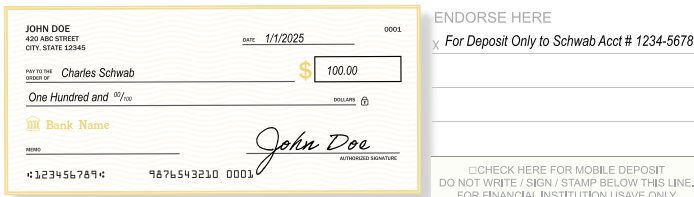
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DVI Gives Back:

Service Day at Peoria's Midwest Food Bank

On April 3, Peoria Associates stepped away from their daily responsibilities to spend the afternoon volunteering together at Midwest Food Bank. Organized by Senior Vice President and Partner Steve Hinrichs, the service event provided an opportunity for Associates to give back while working together to support a vital community resource. "DVI has long recognized the important role Midwest Food Bank plays in combating hunger in our community. We value these group service opportunities in support of their mission," Hinrichs shared. The team contributed to warehouse distribution and operations by packaging and organizing food supplies, making a meaningful impact and fostering connections beyond the office.

DVI Associates take pride in supporting local organizations throughout Central Illinois and Central Florida. We are passionate about giving back, and our efforts are driven by a strong commitment to community stewardship, service, and philanthropy.

