

The DVI Summer Internship Program: Investing in Future Talent

by **Dalton Mellon, CFA**

Portfolio Manager, DVI Summer Internship Coordinator

Formally established in 2015, DVI's Summer Internship Program offers aspiring Relationship and Portfolio Managers a hands-on introduction to the investment and wealth management industry. Over the last decade, it has evolved into a scalable, repeatable framework that balances rigor with flexibility. The 12-week program runs each summer in both our Peoria and Winter Park offices. This year's cohort includes two rising college seniors and one rising junior.

Immersive and Impactful

Interns follow a comprehensive curriculum that includes stock pitches, client case studies, and a final capstone project. They gain real-world experience through software training (FactSet, Morningstar Direct, eMoney), participation in department meetings, and direct contributions to client deliverables and internal initiatives. New this year is the Investment Foundations Certificate, adding formal instruction to complement experiential learning.

In line with DVI's culture of collaboration, each intern is supported by a dedicated supervisor and a network of mentors, ensuring broad exposure to our business. Firm-wide team-building events further deepen connections with our people and values. Additionally, a distinctive aspect of our program is its emphasis on fiduciary responsibility and DVI's client-first philosophy.

A Proven Talent Pipeline

Interns return to campus equipped with both technical and interpersonal skills, as well as continued support from DVI Associates invested in their long-term success. Through mentorship and ongoing engagement, many interns maintain strong professional ties with the firm as they navigate graduation and the job market. In the program's history, four interns have joined DVI as full-time Associates after they graduated—proof of the program's effectiveness in identifying and developing high-potential talent.

Beyond talent development, the program strengthens university partnerships and infuses fresh ideas into the firm. Interns consistently reflect DVI's culture of Quiet Quality and academic excellence, serving as ambassadors for "The DVI Way" on campus and beyond.

Looking Ahead

Our commitment to building a firm that lasts means continually refining the program, tracking alumni success, and exploring ways to broaden its reach and impact.

DVI INTERNSHIPS BY THE NUMBERS



**DVI INTERNS
SINCE 2013:**

15

PROGRAM DURATION:



WEEKS



**OFFICE
LOCATIONS**

UNIVERSITIES REPRESENTED:

- Augustana College
- Bradley University
- Illinois State University
- Stetson University
- Southern Methodist University
- University of Illinois (Urbana-Champaign)

6



**2 DVI MENTORS
PER INTERN**

SAMPLE CAPSTONE PROJECT TOPICS:



- Analysis of President Biden's 2020 Tax Agenda
- REITs & the DVI Model: Real Estate Sector Analysis
- Quantitative Model Improvement Recommendations
- Social Security Analysis
- Comprehensive Client Financial Plan



FULL-TIME OFFERS: 6

ACCEPTED: 4

5-YEAR ACCEPTANCE RATE:



75%

5-YEAR INTERN-TO-FULL-TIME CONVERSION RATE:



50%

DVI will begin accepting applications for the 2026 Summer Internship Program in September. Eligible candidates must be rising juniors or seniors in excellent academic standing at an accredited university. Complete program details, requirements, and application instructions will be shared via DVI's LinkedIn page and through Handshake, the career platform used by many university career centers.

Meet Our 2025 Interns

We're pleased to introduce our summer interns—Drew, Julia, and Caitlyn—who joined the firm in mid-May. Since their arrival, they've made meaningful contributions across a range of projects, bringing strong analytical skills, professionalism, and a fresh perspective to the DVI team. Below, each shares a brief reflection on their experience and work so far this summer.



From left: Drew, Julia, & Caitlyn

Drew Bryant, Augustana College ('26)

Major: Business Administration
Concentrations: Finance & Accounting
DVI Location: Peoria, Illinois

"I've seen just how central tax strategy is to effective wealth management and long-term value creation. From capital gains planning to retirement distributions, tax-loss harvesting, and estate planning, I've started to grasp just how complex and layered the industry really is — and I'm excited about how much more there is to explore and learn."

Julia Ivashko, Stetson University ('27)

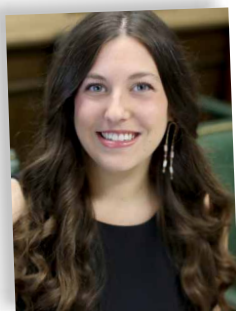
Majors: Accounting & Finance
Minors: Business Systems & Analytics
DVI Location: Winter Park, Florida

"I've gained hands-on experience with industry-leading platforms such as Morningstar, FactSet, and eMoney. This work has sharpened my technical skills and enhanced my ability to translate complex data into meaningful insights — whether in crafting personalized financial plans or conducting in-depth investment research to support client portfolios."

Caitlyn Kulczynski, Stetson University ('26)

Major: Applied Mathematics
Concentration: Actuarial Finance
Minors: Data Analytics & Finance
DVI Location: Peoria, Illinois

"I've gained a deeper understanding of the strategic complexity involved in designing tax-efficient portfolios and retirement plans. I've examined how decisions around asset allocation, the use of qualified retirement vehicles, tax-loss harvesting, and the timing of gain realization can significantly influence long-term client outcomes."



Congratulations to Alexis Morey, CFP®

Please join DVI in congratulating Alexis Morey, Assistant Relationship Manager, on passing the Certified Financial Planner® exam in March. This milestone adds to Lexi's strong academic foundation in fiduciary training and credentials. The CFP® designation is a mark of excellence in the financial industry, requiring not only a rigorous exam but also over 6,000 hours of hands-on financial planning experience. CFP® professionals also adhere to a strict Code of Ethics and are held to the highest standards of fiduciary responsibility. Lexi's achievement reflects her dedication to DVI's core values of excellence and client-first service. We're excited to support her continued growth in the Relationship Management department.