



## DVI Welcomes Alfredo Risi, COO

DVI is proud to introduce Alfredo Risi, the firm's new Chief Operating Officer and a member of DVI's Management Team.

Risi's leadership style blends entrepreneurial agility with corporate discipline. In his role at DVI, Risi will manage the strategic process, implement succession plans, attract and retain top-tier talent, and optimize efficiency through policies, procedures, and technologies. "DVI's long-term performance has been stellar on many aspects, including client retention, asset gathering, revenue expansion, margin achievement, and talent growth," notes Risi, which he attributes to the unwavering commitment of the firm's senior leaders. A culture of exceptional client service that is embedded into every aspect of the firm's operations, DVI's unique ethos resonates with Risi. He shares the firm's commitment to "win-win approaches by which all stakeholders benefit in the long-term through stability and knowledge of each other."

Risi identifies two critical structural trends affecting the investment management industry: succession transition and talent acquisition. "DVI has made significant inroads in these two areas," he observes, "and 2024 will be a year in which our team continues to prioritize these two initiatives." Risi believes his past professional success is a result of holding himself accountable for achieving both qualitative and quantitative objectives as a leader. "A firm's success starts with a clearly articulated strategic vision that is executed by a talented and cohesive team," he says, emphasizing the importance of "all members rowing in the same direction."

Prior to joining DVI, Risi served as the Chief Operating Officer of asset management firms based in Michigan and New York. In addition to his leadership in this sector, Risi's financial services career includes extensive experience in Strategy, Mergers and Acquisitions, and Operations and Technology at MetLife, Silver Lane Advisors, Deutsche Bank, and Merrill Lynch. Risi holds an MBA from the University of Chicago Booth Graduate School of Business and a Bachelor of Science in Economics from Universidad de Lima (Peru).

Beyond his operational acumen and focus on strategy and execution, Risi is guided by his family values: "We believe in doing what is right, understanding diverse points of view, and finding the right balance between personal and professional directions." From his first days in the United States, the Midwest captured Risi's heart, and his family feels aligned with the culture. At DVI, they have found a place where professional objectives align seamlessly with personal fulfillment.

DVI Chairman, President & CEO Will Williams says, "We are thrilled and feel very fortunate to have someone of Alfredo's industry experience and technical capability as part of DVI's senior management team. We were quite patient in our search for a Chief Operating Officer for the firm as we recognized the importance of cultural fit with this new hire. We look forward to Alfredo's contribution to DVI's future success."

Please join all of us at DVI in welcoming Alfredo, his wife, Claudia, and their children, Antonella and Stefano, to the DVI family.



## 2023 DVI Associate of the Year: Jeremy Hanshaw

Selected through peer nomination, the Associate of the Year is a distinction that recognizes an Associate for contributing meaningfully to the firm and embodying the shared values of "The DVI Way": Respect, Innovation, Generosity, Honesty, and Teamwork.

We are pleased to announce that Associate of the Year for 2023 is Jeremy Hanshaw, whose responsibilities as DVI's Senior IT Manager include meticulous oversight of the firm's technology, security, and data management. Jeremy's work impacts nearly all of the firm's operations. He works quietly and fastidiously behind the scenes to simplify processes, ensure data protection and confidentiality, and keep systems up-to-date.

"I like that my work presents a variety of challenges," Jeremy notes. "My mindset is that this work is a journey of continual improvement." Most recently, Jeremy was an integral part of both the new Client Relationship Management

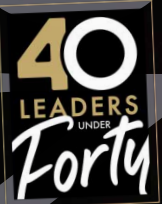


(CRM) software implementation and the development of an internal application to create bulk uploads to the DVI Portal. In their nominations, Jeremy's colleagues appreciate his talent for creating software tools and automating time-consuming tasks, noting that his innovation leads to firm-wide accuracy, precision, and efficiency. "I'm lucky enough to get to work with everyone at the firm," Jeremy says, "and I've seen how well we take care of our clients and each other." Jeremy contributes across the firm's departments and committees, and Associates in both the Peoria and Winter Park offices appreciate his collegiality and collaborative spirit.

We congratulate Jeremy as he joins past Associates of the Year recipients Glenn Maxey (2022), Stephanie Ricketts (2021), and Maryann Sprout (2020).



**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](http://www.dviinc.com/join-team).



## Peoria Magazine's 40 Leaders under Forty: Dalton Mellon, CFA<sup>®</sup>

Congratulations to Dalton Mellon, who was selected as a member of the Class of 2023 for his community contributions to the greater Peoria area. His nominator noted that since joining DVI, Dalton "has completed the Community Leadership School from the Peoria Area Chamber of Commerce...and has run the DVI Corporate Challenge each year since its inception in 2018." To date, participants in this event have contributed over \$300,000 to the South Side Mission. Dalton also volunteers with Peoria Friendship House and Midwest Food Bank.

All forty emerging leaders were honored at a community reception hosted at Bradley University's Renaissance Coliseum in November. The latest issue of *Peoria Magazine* includes full profiles for Dalton and the rest of the Class of 2023.



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