



DAVID VAUGHAN INVESTMENTS

## ***Relationship Manager***

Peoria, Illinois

### ***Do you want more than just a career move?***

David Vaughan Investments, LLC is proud of its Associates. We are an exceptional team of people who are bright, creative, courageous and have a passion for what we do. Every day our focus is on providing the best client advice and service possible, and it's all accomplished within a team-based approach where trust, respect and integrity serve as its core. DVI is currently looking for an experienced ***Relationship Manager*** to join the team and provide immediate positive service to our clients. In this critical role, your primary responsibility will be to build and maintain client relationships, and you will work closely with other DVI Associates to establish their comprehensive wealth-management strategy.

At DVI, we not only strive to provide the highest level of client advice and service possible, but we look to provide a working environment that is attractive to our entire team. Consistent with our long-term client focus, we aim to attract and retain the best Associates possible, and our benefits program is instrumental in this goal. We provide competitive salaries and bonus opportunities, a generous profit sharing 401(k) plan, health insurance, life insurance, short-term and long-term disability programs, and paid time off programs.

### ***Responsibilities***

- Oversee assigned client relationships while also serving as the liaison between the client and the various resources DVI offers.
- Regularly engage with clients via phone, email, video conference, and face-to-face meetings to discuss the client's investment objectives, goals, needs, expectations, performance, and portfolio structures.
- Work directly with clients to help them design, implement and manage a wealth-management plan that supports their objectives.
- Leverage internal and external resources to achieve client objectives in such areas as Investment Management, Estate Planning, Tax Planning, Risk Management and General Planning. Conduct or oversee research into complex investment, tax, and estate planning issues.
- Educate and consult with clients on investment philosophy, performance, and other financial matters.

- Communicate your deep understanding of financial markets as well as current events and other topical issues and how they relate to the client's investment strategy relative to DVI's investment philosophy and approach.
- Develop and expand relationships with centers of influence, such as attorneys and CPAs.
- Generate referrals from existing clients.
- Participate in prospective client meetings and gather relevant financial data.

### ***Qualifications***

- Bachelor's Degree (graduate or advanced degree preferred)
  - Minimum of 5 - 8 years of applicable professional experience
  - Transferable experience in Banking, Law, Insurance, Sales, Marketing, Consulting or Finance is preferred
  - Entrepreneurial spirit and willingness to actively participate in Business Development initiatives
  - Strong interest in Financial Planning and Wealth Management
  - Must be able and willing to successfully complete the Certified Financial Planner® or Chartered Financial Analyst, Series 7, and either Series 66 or Series 65 license is preferred
- \*Strong preference will be given to a candidate that is currently a Certified Financial Planner ®

If you appreciate a work environment that truly lives its values, please review our [DVI Career Opportunities](#) and consider DVI as an employer that consistently provides "Quiet Quality".

### **About David Vaughan Investments**

DVI is a team of 34 experienced investment professionals that provide asset management services and wealth management solutions to both high net worth individuals and institutional investors. For the past 44 years, DVI has employed a "Quiet Quality" approach to investment management: people of integrity, acting solely in their clients' best interests. Currently, we have over 1,100 clients, and approximately \$3.8 billion of Assets Under Advisement through our offices in Peoria, Illinois and Winter Park, Florida. In the fall of 2017, DVI formed a partnership with Morton Community Bank, creating one of the largest privately held financial institutions in downstate Illinois.

For more information visit [www.dviinc.com](http://www.dviinc.com)