

DVI

DAVID VAUGHAN INVESTMENTS

Summer Intern - 2021

Peoria, Illinois

Not Your Average Internship

David Vaughan Investments, LLC (DVI) is proud of its Associates. We are an exceptional team of people who are bright, creative 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 a dynamic individual to join our team as our **Summer Intern** for 2021. Our intern candidate will rotate through DVI's main areas of focus including Portfolio Management & Research, Relationship Management and Investment Operations.

During the Portfolio Management & Research rotation, the Intern will gain an understanding of DVI's long-running investment philosophy and how DVI constructs custom portfolios; become acquainted with DVI's quantitative model and asset allocation philosophy; and gain exposure to the firm's equity analysis and stock selection process, and its trading desk. In the Relationship Management rotation, the intern will learn how DVI's client-focused philosophy applies to various investment, tax, legal, estate and financial planning issues, and learn the structure and investment process used when consulting on institutional 401(k) plans. The Intern will have client-related activities assigned with the opportunity to work with real-life situations. The final, Investment Operations rotation of the internship will provide an understanding of the support areas of our firm that are essential to DVI's client-centered success.

Responsibilities

- Complete a rotation through each of the firm's main areas including Portfolio Management, Relationship Management and Investment Operations

- Navigate and leverage financial software including Morningstar Direct, FactSet, Bloomberg, eMoney Advisor and Advent products

- Responsible for investment and market research

- Conduct analysis on current and prospective client portfolios

- Build and manage client financial plans

- Rotate through the functional areas of a modern bank Trust Company

- Assist with miscellaneous tasks and projects as requested

Qualifications

Sophomore or junior level academic status

Minimum GPA of 3.0

Working towards a degree in Finance/Accounting/Financial Planning/General Business with a finance-related concentration

Must be focused and well-organized with above-average communication skills; have an ability to learn quickly and an appreciation for a team-oriented work environment

Internship specifics

40-hour workweek

Paid internship position

May – August 2021

If you appreciate a work environment where Associates strive to always "do the RIGHT thing," 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 33 experienced investment professionals that provide asset management services and wealth management solutions to both high net worth individuals and institutional investors. For the past 43 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 1000 clients, and over \$3.0 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