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DOWLING & YAHNKE CELEBRATES 20 YEARS

San Diego, CA - August 2011: Dowling & Yahnke is celebrating its 20th anniversary as an independent financial adviser to the San Diego community. The founding partners, Mark Dowling and Dale Yahnke, started the firm in 1991 when the independent adviser model was a new concept in the investment industry. Now, twenty years later, Dowling & Yahnke has grown to become the largest independent Registered Investment Adviser in San Diego (as reported by *Investment News**).

“Our continued success is a reflection of the confidence placed in us by our clients,” stated Dale Yahnke, founding partner. “Throughout our history, we have been proud of our maintaining a world-class service. As the number of clients we serve has increased, our assets under management now exceed \$1.7 billion, we have expanded our portfolio management team and support staff to ensure the best possible client experience.”

“Since our firm’s inception, the investment markets have attained historic highs and experienced gut-wrenching corrections,” said Mark Dowling, founding partner. “We have witnessed significant escalation in financial market regulation and tax complexities. Throughout this time, we have assembled a team of dedicated, knowledgeable, and experienced professionals to help our clients navigate these challenging financial waters. We are truly appreciative of our clients’ trust in our team.”

Dowling & Yahnke also prides itself on its involvement in the San Diego community. “Over the last twenty years, we have been very active in supporting local charities and causes,” said Dale Yahnke. “In fact, we donate our time and financial support to more than 30 local organizations annually. We feel it is important to give back to the San Diego community.”

About Dowling & Yahnke, LLC

Since 1991, Dowling & Yahnke has provided customized solutions in investment management, retirement planning, and charitable giving. As a fiduciary, fee-only adviser, Dowling & Yahnke places clients’ interests first, giving them peace of mind in a complex financial world.

Dowling & Yahnke is one of the largest independent, wealth management firms in San Diego and is nationally ranked by *Investment News* as one of the 50 largest independent Registered Investment Advisers *. For the fourth consecutive year, Dowling & Yahnke is the only San Diego County firm with an adviser on the *Barron’s Top 100 Independent Advisers List*. For more information, visit dywealth.com.

*As reported by RIA Database for Registered Investment Advisory firms based on discretionary assets under management as defined by the Securities and Exchange Commission and reported as of March 31, 2011. Firms were included based upon the following criteria: greater than 50% of their business must serve the retail marketplace; they provide financial planning services, wealth management, or portfolio management for individuals; they do not conduct business as a broker/dealer; they do not charge commissions or employ brokers; and a dominant portion of their business must not be managing proprietary products.

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