



## Alana C. Asmussen, CFA, CFP®

LEAD ADVISOR, PRINCIPAL

Alana Asmussen is a Lead Advisor and Principal at Dowling & Yahnke Wealth Advisors.

Alana joined Dowling & Yahnke in 1995 and is a key participant in the growth and development of the Firm. She has extensive experience managing portfolios and guiding clients through all phases of their financial lives.

Alana holds the designations Chartered Financial Analyst (CFA), CERTIFIED FINANCIAL PLANNER™ (CFP®), and has a Master of Science in Business Administration, Financial Planning (MSBA) from San Diego State University. She completed her undergraduate work at the University of Iowa with a Bachelor's Degree in Business, Economics.

Alana is an enthusiastic world traveler, a voracious reader, and the proud parent of an adorable French Bulldog. Born and raised in Iowa, she moved to San Diego in 1992.

Dowling & Yahnke offers time-tested, objective financial planning advice and investment management services designed to secure the financial health and personal freedom of its clients. Located in San Diego, California, the Firm manages approximately \$4 billion for more than 1,000 clients, primarily individuals, families, and nonprofit organizations.

### Contact

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### EDUCATION

- University of Iowa, BBA Economics
- San Diego State University, MSBA Financial & Tax Planning

### PROFESSIONAL ORGANIZATIONS

- CFA Institute
- CFA Society of San Diego, Inc.; Past President

### COMMUNITY INVOLVEMENT

- P.E.O. International, a women's philanthropic, educational organization, Member
- Rady Children's Hospital Foundation, Member of Estates & Trusts Executive Committee