



#### Contact

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## Dale E. Yahnke, CFA, CFP®

CHIEF EXECUTIVE OFFICER, PRINCIPAL

Dale Yahnke is the Chief Executive Officer and a Principal at Dowling & Yahnke Wealth Advisors.

Dale holds the designations of Chartered Financial Analyst (CFA) and CERTIFIED FINANCIAL PLANNER™ (CFP®). He has a Master of Business Administration, Finance (MBA) degree from San Diego State University. Dale completed his undergraduate work at Claremont McKenna College with a degree in Economics.

Prior to Dowling & Yahnke, Dale worked for six years as a financial analyst with the law firm of Gray Cary Ware & Freidenrich (now known as DLA Piper US LLP). He has served as an expert witness in investment and securities related matters.

Dale has been featured in numerous financial publications including *Barron's*, *Worth*, and *The Wall Street Journal*. In 2018, he was recognized for the twelfth consecutive year by *Barron's* as one of its "Top 100 Independent Financial Advisors" in the country.\* He is one of only eleven advisors nationwide who have been recognized every year *Barron's* has conducted its national rankings. Dale was also named to the *Barron's* "2017 Top Advisor Rankings: California" for the fourth consecutive year - a list on which he has been included since they began ranking RIAs.\*\*

Dale, a native San Diegan who lives in Carmel Valley with his wife and two children, is actively committed to the San Diego community and the investment advisory industry.

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.

#### EDUCATION

- Claremont McKenna College, BA Economics
- San Diego State University, MBA with emphasis in Finance

#### RECENT HONORS AND AWARDS

- Barron's 2018 "Top 100 Independent Financial Advisors"\*
- Barron's 2017 "Top Advisor Rankings: California"\*\*\*

## PROFESSIONAL ORGANIZATIONS

- CFA Institute and CFA Society of San Diego, Inc.
- San Diego Estate Planning Council, Past Member
- La Jolla Estate Planning, Trust and Probate Section; Past Member

## COMMUNITY INVOLVEMENT

- Legacy Foundation Board, Member
- Rady Children's Hospital Foundation, Member of the Board of Trustees and Member of Estates and Trusts Committee
- Voices for Children, Member of the Board of Directors and Strategic Planning Committee
- Junior Seau Foundation, Member of the Board of Trustees
- Tamarac, Member of the Board of CEOs
- Children's Hospital, Past Member of the Planned Giving Board
- San Diego Museum of Man, Past Member of the Board of Trustees

### **\*BARRON'S 2018 "TOP 100 INDEPENDENT FINANCIAL ADVISORS"**

*Barron's* Disclosure: The ranking reflects the volume of assets overseen by the advisors and their teams, revenues generated for the firms and the quality of the advisors' practices. The scoring system assigns a top score of 100 and rates the rest by comparing them with the winner.

Additional Disclosures: *Barron's* requested Dowling & Yahnke to apply for the ranking. The information for the ranking was compiled by the advisor and may or may not be verified by *Barron's*. It is unknown as to the number of applicants considered for the ranking and the percentage of applicants that made the ranking. The award should not be viewed as representative of any one client's experience and should not be taken as an indication of performance by Dowling & Yahnke and any of its clients. While Dowling & Yahnke did not pay a fee to apply for the award, the firm does purchase goods or services from the publisher of the award (such as subscriptions to the publication, reprints of the ranking, and payment to be included in other *Barron's*-published lists).

### **\*\*BARRON'S 2017 TOP ADVISOR RANKINGS: CALIFORNIA**

*Barron's* Disclosure: Here are America's best financial advisors, organized by state. The rankings are based on data provided by over 4,000 of the nation's most productive advisors. Factors included in the rankings: assets under management, revenue produced for the firm, regulatory record, quality of practice and philanthropic work. Investment performance isn't an explicit component because not all advisors have audited results and because performance figures often are influenced more by clients' risk tolerance than by an advisor's investment-picking abilities. A ranking of "N" denotes "not ranked that year."

Additional Disclosures: *Barron's* requested Dowling & Yahnke to apply for the listing which is a paid advertising section in *Barron's*. The information for the ranking was compiled by the advisor and may or may not be verified by *Barron's*. The award should not be viewed as representative of any one client's experience and should not be taken as an indication of performance by Dowling & Yahnke and any of its clients. In addition to paying a fee to be on this list, Dowling & Yahnke does purchase other goods or services from the publisher of the award (such as subscriptions to the publication and reprints of rankings).