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Kelly A. Feldmann, CFP®

FINANCIAL PLANNER

Kelly Feldmann is a Financial Planner at Dowling & Yahnke Wealth Advisors.

Kelly joined Dowling & Yahnke in 2018 and designs customized personal financial plans for clients. Prior to Dowling & Yahnke, she was a financial planner at a wealth advisory group in San Diego.

Kelly holds a CERTIFIED FINANCIAL PLANNER™ (CFP®) designation and has a Master of Business Administration (MBA) from San Diego State University. She completed her undergraduate work in Finance at San Diego State University. Her experience includes interning at a wealth management firm as well as a CPA firm while obtaining her MBA.

Born and raised in New Mexico, Kelly moved to San Diego in 2005. She lives in Carmel Valley with her husband.

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

EDUCATION

- San Diego State University, BS Finance
- San Diego State University, MBA

PROFESSIONAL ORGANIZATIONS

- Financial Planning Association (FPA), Member
- Athena San Diego, Member

COMMUNITY INVOLVEMENT

- Junior Achievement, Past Volunteer