



#### Contact

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## Brett R. Pernicano, CFA, CFP®, CEPA, CDFIA®, ChFC®, CLU®

LEAD ADVISOR, PRINCIPAL

With over fifteen years of experience in the financial services industry, Brett has provided clients with financial guidance in areas including asset management and comprehensive financial planning.

Brett holds the Chartered Financial Analyst (CFA), CERTIFIED FINANCIAL PLANNER™ (CFP®), Certified Exit Planning Advisor (CEPA), Certified Divorce Financial Analyst®, and Chartered Financial Consultant® (ChFC®) designations. He completed his undergraduate work at the University of Washington with a degree in Business Administration with an emphasis in Finance.

As a third generation San Diegan, Brett has deep roots in the community. Brett currently resides in Del Sur with his wife and their two children. During his down time, he enjoys playing beach volleyball, snowboarding, and golf.

Dowling & Yahnke Wealth Advisors offers time-tested, objective investment management and financial planning designed for the financial health of its clients. Located in San Diego, California, the Firm manages over \$5 billion for more than 1,300 clients, primarily individuals, families, and nonprofit organizations.

#### EDUCATION

- University of Washington BA Business Administration with an emphasis in Finance

#### PROFESSIONAL ORGANIZATIONS

- CFA Institute and CFA Society of San Diego, Inc.
- Corporate Directors Forum
- Chairmen's RoundTable
- ProVisors
- Institute for Divorce Financial Analysts™

#### COMMUNITY INVOLVEMENT

- Promises2Kids, Board Member