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Erik Nelson, CFP®

FINANCIAL PLANNER

Erik joined Dowling & Yahnke in 2019 and designs customized personal financial plans for clients. Prior to Dowling & Yahnke, he served in financial planning and advisory roles over the last five years with two local investment management firms in San Diego.

Erik holds a CERTIFIED FINANCIAL PLANNER™ (CFP®) designation and a Master of Science in Business Administration (MsBA) in Financial & Tax Planning from San Diego State University. He completed his undergraduate work in Business Administration and Finance at San Diego State University.

Erik is a native San Diegan who currently resides in La Jolla and is an avid sports fan.

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 \$4 billion for more than 1,200 clients, primarily individuals, families, and nonprofit organizations.

EDUCATION

- San Diego State University, BS Business Administration, Finance
- San Diego State University, MsBA in Financial & Tax Planning