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Gregory J. Richardson, CFP®, MPASSM

LEAD ADVISOR, PRINCIPAL

Greg prudently advises his clients in the areas of investment management and financial planning, guiding them through the stages of wealth accumulation, distribution, and preservation. Greg began his career in the investment advisory field in 2002. Prior to joining Dowling & Yahnke, he was a partner and advisor with fee-only firms in San Diego and the Washington D.C. metropolitan area.

Greg holds the Master Planner Advanced Studies (MPAS[®]) and CERTIFIED FINANCIAL PLANNER[™] (CFP[®]) designations. He has a Master of Science degree in Personal Financial Planning from the College for Financial Planning. Greg completed his undergraduate work at the University of California, San Diego with a degree in Economics and earned a certificate in Spanish Language and Culture from the Universidad Complutense de Madrid.

Greg is a native of Southern California. Prior to returning to San Diego, he lived in Washington, D.C. Greg lives in Scripps Ranch with his wife and two sons.

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

- University of California, San Diego, BA Economics
- Universidad Complutense de Madrid, Spanish Language and Culture Program
- College for Financial Planning, MS Personal Financial Planning

PROFESSIONAL ORGANIZATIONS

- National Association of Personal Financial Advisors (NAPFA)
- North County Estate Planning Council, San Diego (NCEPC)
- Association for Corporate Growth (ACG), San Diego Chapter
- Financial Planning Association (FPA), Past Member

COMMUNITY INVOLVEMENT

- San Diego Economic Development Corporation (EDC), Board of Directors
- Rady Children's Hospital Professional Adviser Council, Member