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Mark J. Muñoz

CHIEF OPERATING OFFICER, PRINCIPAL

Having joined Dowling & Yahnke in 2009, Mark is the Firm's Chief Operating Officer and Chief Financial Officer, overseeing administration, marketing, technology, financial management, and operations. He earned a Master of Business Administration (MBA) degree from the University of Chicago and a Bachelor of Science degree from Miami University (Ohio), where he majored in Finance and graduated magna cum laude.

Mark has extensive and diverse experience in operations and business leadership, including ten years managing capital markets businesses for Bankers Trust, Lehman Brothers, and Bank of America in the U.S. and overseas. Prior to Dowling & Yahnke, he was co-founder, Chief Operating Officer, and Chief Financial Officer for an industry-leading wireless technology company.

Mark was born and raised in Ohio and moved to La Jolla in 1999. He is married with two children.

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

- Miami University (Ohio), BS Finance
- University of Chicago, MBA

PROFESSIONAL ORGANIZATIONS

- Association for Corporate Growth (ACG), San Diego
- Corporate Directors Forum
- Dimensional Fund Advisors, COO Forum
- Technology, Operations & Service Advisory Board of Charles Schwab & Co., Inc. (2010-2013)

COMMUNITY INVOLVEMENT

- San Diego Chapter of the University of Chicago Alumni Association
- Confrérie des Chevaliers du Tastevin
- La Jolla Playhouse, Board of Trustees (2013 - 2019)