



#### Contact

12265 El Camino Real, Suite 300  
San Diego, CA 92130  
(858) 509-9500  
will.beamer@dywealth.com

## William G. Beamer, CFA, CFP®

PRESIDENT, CHIEF INVESTMENT OFFICER, PRINCIPAL

Will joined Dowling & Yahnke in 2002 and became a Principal of the Firm in 2007. In addition to advising clients, Will serves as the firm's Chief Investment Officer, overseeing all investment-and trading-related operations. In 2013 Will was named President of the Firm.

Will holds the Chartered Financial Analyst (CFA) and CERTIFIED FINANCIAL PLANNER™ (CFP®) designations. He has a Masters in Business Administration (MBA) degree from Harvard Business School. Will attended Duke University on a four-year Navy ROTC scholarship. At Duke, Will earned a Bachelor of Arts degree, majoring in History and graduating with honors.

Will's prior experience includes nearly three years with Bain & Company, a management consulting firm in Boston. Prior to business school, Will spent four years in the U.S. Navy Pacific Fleet as a surface warfare officer on a Spruance-class destroyer.

A San Diego native, Will lives in Carmel Valley with his wife and their four 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

- Duke University, BA History
- Harvard Business School, MBA

#### PROFESSIONAL ORGANIZATIONS

- Young Presidents' Organization (YPO), San Diego chapter
- 2011 graduate of the LEAD IMPACT San Diego program
- CFA Institute and CFA Society of San Diego, Inc.

## COMMUNITY INVOLVEMENT

- Board of Directors, The Parker Foundation
- Investment Committee, San Diego Zoo Global
- Board of Trustees, Board Governance and Investment Committees, Francis Parker School
- Investment Committee, Serving Seniors
- Investment Committee, San Diego Museum of Art
- Harvard Business School Alumni Club of San Diego
- Duke Club of San Diego
- Board of Directors, Scripps Mercy Hospital Foundation (2011-2017)