



Contact

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

Mark Wernig, CFP®

LEAD ADVISOR, PRINCIPAL

Mark joined Dowling & Yahnke Wealth Advisors in 2015 and is dedicated to serving the Firm's clients and delivering personalized investment and financial planning advice.

After becoming a Principal in 2018, he was invited to join the Firm's Executive Committee in 2020. Mark has been recognized nationally as a top "40 Under 40" in financial planning by *InvestmentNews* and locally by the the *San Diego Business Journal* in business leadership.¹⁻² He is a graduate of both the U.S. Naval Academy (Annapolis, MD) and the U.S. Naval War College (Newport, RI). Mark holds the CERTIFIED FINANCIAL PLANNER™ (CFP®) designation and earned an MBA from the UC San Diego, Rady School of Management.

Prior to joining the Firm, Mark served nearly eleven years in the U.S. Navy as a Surface Warfare Officer, deploying six times and traveling extensively throughout the Middle East and Asia. He is presently a Commander in the U.S. Navy Reserve.

Mark was born and raised in Northeast Ohio. He lived overseas and on both coasts for a number of years before settling in San Diego with his wife and three daughters.

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

- United States Naval Academy, BS Political Science
- United States Naval War College, MA National Security and Strategic Studies
- University of Maryland, College Park, MPS Leadership, Education & Development
- University of California, San Diego, MBA Finance

HONORS & AWARDS

- 2020 *InvestmentNews* "40 Under 40"¹
- 2020 *San Diego Business Journal* Next Top Business Leader²

PROFESSIONAL ORGANIZATIONS

- CFP Board, Ambassador (San Diego)
- CFP Board, Workforce Development Advisory Group
- Association for Corporate Growth San Diego

COMMUNITY INVOLVEMENT

- Cancer for College, Board of Directors
- San Diego Military Advisory Council (SDMAC), Board of Directors
- Armed Services YMCA Camp Pendleton, Board of Directors
- FourBlock San Diego
- Board of Directors and Finance Committee, Serving Seniors (formerly Senior Community Centers of San Diego) (2004-2010)
- La Jolla Golden Triangle Rotary Club (2003-2012)

¹ 2020 *InvestmentNews*' "40 Under 40"

Disclosure: InvestmentNews accepted nominations of professionals from all sides of the financial advisory industry, including registered investment advisers, registered representatives, financial planners, brokers, insurance agents, certified public accountants, bank trust officers, firm executives and those working for industry organizations.

Nominees' eligibility for the 40 Under 40 list were based on the following criteria: accomplishment to date, contribution to the industry, leadership, and promise. There was no fee to participate.

² 2020 *San Diego Business Journal's* "40 Next Top Business Leaders Under 40"

Disclosure: A nomination form was submitted to San Diego Business Journal to be considered for this award.

Approximately 158 applicants were considered for the ranking, ninety-one applicants were selected as finalists, and 40 winners were chosen by a panel of independent judges. The award should not be viewed as representative of any one client's experience and should not be taken as an indication of performance by Dowling & Yahnke Wealth Advisors and any of its clients. While Dowling & Yahnke Wealth Advisors did not pay a fee to apply for the award, the firm does purchase goods or services from the publisher of the award (such as subscriptions to the publication, reprints of the ranking, and payment to be included in other San Diego Business Journal-published lists).