



Matthew R. Adams, CFP[®], CPA, CDFA[®]

LEAD ADVISOR

Matt joined Dowling & Yahnke Wealth Advisors in 2017. He holds the CERTIFIED FINANCIAL PLANNER[™] (CFP[®]), Certified Public Accountant (CPA), and Certified Divorce Financial Analyst[®] certifications. Matt completed his undergraduate work at UC Santa Barbara where he majored in Business Economics and Accounting, graduating cum laude. He was also an intercollegiate men's volleyball scholar athlete at UCSB.

Prior to joining D&Y, Matt spent 15 years in the financial services industry in various capacities. He started his career as a Certified Public Accountant with Deloitte, a global accounting firm, where he worked in their San Diego, Sydney, and London offices. More recently, he was a wealth manager at a San Diego-based independent advisory firm.

Matt is a San Diego native. Having grown up in Olivenhain, he now lives in Solana Beach with his wife and their two sets of twins (fraternal girls and identical boys).

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.

Contact

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EDUCATION

- University of California, Santa Barbara, BA Business Economics and Accounting

PROFESSIONAL ORGANIZATIONS

- California Society of CPAs (CalCPA)
- North County Estate Planning Council
- Financial Planning Association (FPA)
- Institute for Divorce Financial Analysts[™]

COMMUNITY INVOLVEMENT

- Mira Costa College Foundation, Board Member
- Nature Collective, Past Executive Committee Board Member
- AVID Center, Past Audit Committee Board Member
- San Diego Community Resource Center, Past Audit Committee Board Member