



FOR IMMEDIATE RELEASE

CONTACT: Mark Muñoz
Dowling & Yahnke, LLC
12340 El Camino Real, Suite 450
San Diego, CA 92130
Telephone: (858) 509-9500
Facsimile: (858) 509-9520
mark.munoz@dywealth.com

DOWLING & YAHNKE WEALTH MANAGEMENT CELEBRATES 25-YEAR ANNIVERSARY

San Diego – June 6, 2016: Financial advisory firm Dowling & Yahnke, LLC is celebrating its quarter century in business. With the goal to thoughtfully provide clients with peace of mind in a complex financial world, Dowling & Yahnke has maintained an independent, personalized approach to wealth management since its founding in 1991. The Firm has risen to become one of the largest independent wealth management firms in Southern California with over \$3 billion under management. Dowling & Yahnke remains the only San Diego County-based independent advisory firm recognized on *Forbes Top 100 Wealth Managers* list (May 1, 2015) and with an advisor on *Barron's Top 100 Independent Financial Advisors* ranking (August 22, 2015).

Mark Dowling and Dale Yahnke founded the Firm 25 years ago to serve clients as a fiduciary, putting client interests first with transparency and avoidance of conflicts of interest. A quarter century ago, managing client assets as a fiduciary was “bucking the trend” of a commission- and product-based approach to managing investments.

“I’m pleased for our team to have achieved this significant milestone,” said Dale Yahnke, co-founder and CEO. “When Mark and I started the Firm, we knew the fiduciary approach to managing investments was a far superior model. Historically, the primary source of investment advice was going to a salesperson who was compensated for selling products with commissions. Providing investment advice as a fiduciary was at that time a revolutionary concept that has since gained significant momentum. We are pleased to have been an early pioneer of this practice.”

During the last quarter century, the fiduciary approach has gained followers, including regulators such as the U.S. Department of Labor which recently announced regulatory changes to mandate that financial professionals must act in the best interest of their clients when advising on the management of retirement accounts.

Other aspects of Dowling & Yahnke have remained steadfast, including its five core values: Enduring Relationships, Excellence, Integrity, Knowledge, and Passion. Such guiding principles are reflected in the high caliber of professionals at the Firm and its ongoing commitment to the San Diego community.

“Dowling & Yahnke has always placed a premium on both academic and industry credentials which have long been a differentiator for us,” said Will Beamer, President and Chief Investment Officer. “Additionally, we are proud of our longstanding involvement and relationship with the San Diego community. This past year, Dowling & Yahnke committed financial support and numerous service hours to over 40 non-profit, San Diego organizations. We are grateful for the success San Diego has provided us and are proud to support the San Diego community.”

About Dowling & Yahnke, LLC

Since 1991, Dowling & Yahnke has provided customized solutions to high net worth and non-profit clients who value extremely personalized investment management and wealth planning services. As a fiduciary, fee-only adviser, Dowling & Yahnke places clients’ interests first. Located in San Diego, California, the Firm currently manages approximately \$3 billion for more than 1,000 clients, primarily individuals, families, endowments and foundations.

For more information, visit www.dywealth.com

##END##