



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

DALE YAHNKE HONORED IN *BARRON'S*

***ONE OF TWELVE U.S. ADVISORS ON ITS "TOP 100 INDEPENDENT ADVISORS"
RANKING EVERY YEAR***

San Diego – March 20, 2017: In this week's publication, *Barron's* honors a select group of twelve U.S. financial advisors, "[Our Independent Advisory All-Stars.](#)" [Dale Yahnke](#) and eleven other advisors have been selected each of the last ten years to the *Barron's* "Top 100 Independent Advisors." Starting in 2007, *Barron's* has conducted this annual survey to determine the ranking of the top 100 independent advisors in the United States.

"Every year, I have been grateful to be selected by *Barron's* to be included on their top independent advisors ranking," said Dale Yahnke, CEO and co-founder of Dowling & Yahnke, LLC. "To have been selected each of the last ten years is truly a special honor and has been a team effort. This consistency is a reflection of our Firm's steadfast culture - being client-centric, thoughtful, and detail-oriented all result in long-term success for our clients and, as an offshoot, for our Firm."

Dowling & Yahnke is celebrating its 25th anniversary. 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. While the industry has evolved and the fiduciary approach has gained significant momentum and awareness, Dowling & Yahnke is proud to point to a 25-year history of unwavering adherence to this approach.

The Firm has risen to become one of the largest independent wealth management firms in Southern California with over \$3 billion of assets under discretionary management, serving over 1,000 clients, and comprised of 45 team members.

"Our steady growth has allowed us to invest in better ways to serve our clients," according to Will Beamer, President and Chief Investment Officer. "We continuously evaluate various investment alternatives and also devote resources to new technology and hiring top tier, highly

credentialed team members.” The Dowling & Yahnke team includes nine CFA® charterholders, sixteen CFP® practitioners, and graduates from the University of Pennsylvania, Harvard University, the University of Chicago, and Northwestern University. “Dowling & Yahnke has always placed a premium on both academic and industry credentials, which has long differentiated our Firm,” said Mr. Beamer.

About Dowling & Yahnke, LLC

Founded in 1991, Dowling & Yahnke is a fiduciary, fee-only adviser providing personalized investment management and wealth planning services. The Firm currently manages over \$3 billion in assets for more than 1,000 clients, primarily individuals, families, endowments and foundations. Located in San Diego, California, Dowling & Yahnke has been deeply committed to the local community by devoting numerous service hours in addition to financial support to many worthy causes each year.

For more information, visit www.dywealth.com

##END##