

Mark E. Dowling, CFA, CFP®

Founding Partner (Retired)



Mark Dowling, who retired in 2015, is a Founding Partner at Dowling & Yahnke, an independent, fee-only registered investment adviser. Dowling & Yahnke provides comprehensive portfolio management and retirement planning. Located in San Diego, California, the Firm currently manages approximately \$3 billion for more than 1,000 clients, primarily individuals, families, endowments and foundations.

Mark holds the designations Chartered Financial Analyst (CFA), CERTIFIED FINANCIAL PLANNER™ (CFP®), and has a Master of Business Administration, Finance (MBA) degree from San Diego State University. He completed his undergraduate work at San Diego State University with a degree in Industrial Arts.

Mark has taught financial planning and investments at the adult education, community college, and university levels. He has been instrumental in the development and review of competency tests for financial planning professional organizations. He has worked on committees for the Board of Examiners of the Certified Financial Planner Board of Standards to develop and maintain the comprehensive examination required of all CFP® candidates.

Mark was born and raised in Southern California, is married, and has two children.

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 Dowling & Yahnke

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Education

- San Diego State University BS Industrial Arts
- San Diego State University MBA with emphasis in Finance

Professional Organizations

- National Association of Personal Financial Advisors (NAPFA)
- Financial Planning Association (FPA)
- CFA Institute and CFA Society of San Diego, Inc.

Community Involvement

- Advisory Board of the Coastal Community Foundation