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**Anna E. Diaz, CFP® , CEPA, Earns the Certified Private Wealth
Advisor® (CPWA®) Certification**

San Diego — November 3, 2020: Dowling & Yahnke Wealth Advisors, currently managing over \$4.7 billion of assets for over 1,200 clients, is proud to announce that [Anna Diaz, CFP®, CEPA®](#), recently earned the Certified Private Wealth Advisor® (CPWA®) certification. The CPWA® is an advanced professional certification for advisors who provide the breadth of specialized skills required to meet the needs of high-net-worth clients. The CPWA® certification education program was conducted in partnership with The University of Chicago Booth School of Business.

To earn certification issued by Investment & Wealth Institute, CPWA® professionals must meet a five-year experience requirement, successfully complete coursework in advanced wealth management strategies, and pass a comprehensive examination covering eleven core topics including applied behavioral finance, charitable giving, estate planning, and wealth transfer. To maintain certification, CPWA® professionals must meet ongoing continuing education requirements and adhere to the Institute's Code of Professional Responsibility.

"Dowling & Yahnke Wealth Advisors continues to invest heavily in our people to enhance the firm's financial planning capabilities," says Mike Brown, Principal. "Anna's completion of the CPWA® program highlights her commitment to delivering outstanding value for our clients. Congratulations to Anna for achieving this significant accomplishment!"

Anna specializes in helping clients plan for important life stages such as retirement, liquidity events, and thoughtful transition of wealth. Anna began her career in the private banking and wealth management industry in 1997. Prior to joining Dowling & Yahnke, she was a Senior Vice President and Private Client Advisor at a national private wealth advisory institution for 16 years.

About Dowling & Yahnke, LLC

Since 1991, Dowling & Yahnke Wealth Advisors has offered time-tested, objective financial planning advice and investment management services designed for the financial health of its clients. Located in San Diego, California, the Firm manages over \$4.7 billion for over 1,200 clients, primarily individuals, families, and nonprofit organizations. Dowling & Yahnke Wealth Advisors is one of the largest independent wealth advisory firms in San Diego as measured by discretionary assets under management.

Disclosure: INVESTMENTS & WEALTH INSTITUTE® is a registered mark of Investment Management Consultants Association Inc. doing business as Investments & Wealth Institute. CPWA®, and CERTIFIED PRIVATE WEALTH ADVISOR® are registered certification marks of Investment Management Consultants Association Inc. doing business as Investments & Wealth Institute.

For more information, visit www.dywealth.com.

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