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Emily R. Zerbato, IACCP®

CHIEF COMPLIANCE OFFICER

Emily joined Dowling & Yahnke Wealth Advisors in 2020 as Compliance Administrator and now is the firm's Chief Compliance Officer. Emily holds the Investment Adviser Certified Compliance Professional (IACCP®) designation and received her Bachelor of Arts in Psychology from Ashford University, Magna Cum Laude.

Prior to joining Dowling and Yahnke, she worked for three years as an operations and compliance analyst within an emerging Registered Investment Advisor. She was responsible for developing and implementing the firm's compliance and operations program. Previously, she was a third-party regulatory consultant and provided consulting services on investment adviser and broker-dealer regulatory matters.

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 \$5.7 billion for more than 1,300 clients, primarily individuals, families, and nonprofit organizations.

EDUCATION

- Ashford University, Bachelor of Arts in Psychology, Magna Cum Laude

PROFESSIONAL ORGANIZATIONS

- Investment Adviser Association (IAA)
- Southern California Compliance Group (SCCG)