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**ANNA E. DIAZ, CFP®, CPWA®, CEPA, PROMOTED TO PRINCIPAL OF
DOWLING & YAHNKE WEALTH ADVISORS**

San Diego, California — March 23, 2021: Dowling & Yahnke Wealth Advisors (D&Y), currently managing over \$5 billion of assets for over 1,300 clients, is proud to announce that **Anna E. Diaz, CFP®, CPWA®, CEPA** has been promoted to Principal of the Firm. Anna provides clients with financial guidance in areas including high-net worth asset management, liquidity events, financial planning and thoughtful wealth transitions for the purpose of supporting current and future generations.

Anna joined Dowling & Yahnke Wealth Advisors in 2018. Prior to joining D&Y, she was a Senior Vice President and Private Client Advisor at a national private wealth advisory institution for 16 years. In addition to the CFP and CEPA designations, she holds 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. Anna also holds a Certificate in Investment Strategies and Portfolio Management from Wharton School of the University of Pennsylvania. She completed her undergraduate work in Financial Services at San Diego State University.

“We are thrilled to have Anna join our talented and experienced group of Principals,” stated Will Beamer, President of Dowling & Yahnke Wealth Advisors. “Anna has had a major positive impact on D&Y in a relatively short period of time. Her empathetic and inquisitive style, combined with her specialized knowledge of business exit, philanthropic, and legacy planning, enables her to develop deep, trusting relationships with clients, professional partners and prospective clients alike.”

As a native San Diegan, Anna has deep roots in the community. Not only is she a member of the Non-Profit Institute Board, she is active with several professional organizations, including the RSF Foundation Professional Advisors Council, North County Estate Planning Council, Rady Children’s Hospital Foundation Estates & Trusts Council, Trusted Charitable Advisor, and is a LEAD San Diego graduate.

About Dowling & Yahnke Wealth Advisors

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 \$5 billion for over 1,300 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. **For more information, visit www.dywealth.com.**

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