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**TIMOTHY J. LEE, CFP®, PROMOTED TO FINANCIAL PLANNER OF
DOWLING & YAHNKE WEALTH ADVISORS**

San Diego — August 17, 2021: Dowling & Yahnke Wealth Advisors, currently managing over \$5.7 billion of assets for more than 1,300 clients, is proud to announce that **Timothy Lee, CFP®** has been promoted to a Financial Planner of the firm.

“Tim’s promotion to Financial Planner is the result of his continued dedication to the craft of financial planning,” said Greg Richardson, Principal. “As a key member of our talented team, Tim marries his technical skills with an incredible level of care and thoughtfulness, guiding clients through the process of reaching their financial goals. We are thrilled to share Tim’s elevation to the role of Financial Planner.”

Tim joined Dowling & Yahnke Wealth Advisors in 2019 as a Paraplanner. He now designs customized, personal financial plans for clients. Tim holds a Certified Financial Planner™ (CFP®) designation. He received his undergraduate degree in Economics from the University of California, San Diego.

Prior to joining Dowling & Yahnke, he served as a Client Support Specialist at eMoney Advisor and completed internships at two local investment management firms in San Diego.

Tim is a California native and resides in La Jolla. He enjoys playing the acoustic guitar with his church group during their weekly services.

About Dowling & Yahnke Wealth Advisors

Since 1991, Dowling & Yahnke 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 approximately \$5.7 billion for more than 1,300 clients, primarily individuals, families, and nonprofit organizations.

For more information, visit www.dywealth.com.

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