



John M. Peters, CFA

LEAD ADVISOR

With over twelve years of experience in the financial services industry, John supports clients by managing high-net-worth portfolios and building sound financial plans. Prior to joining Dowling & Yahnke, he spent five years as a Senior Vice President and Senior Portfolio Manager at a national private wealth advisory institution. In addition, John was a Portfolio Manager at two local RIA firms.

John holds the Chartered Financial Analyst (CFA) designation. He earned a Bachelor of Arts degree in Finance and a Minor in Economics from Western Washington University. John also studied abroad at the University of Newcastle, Australia.

John resides with his fiancé in San Diego. During his downtime, he enjoys world traveling, snowboarding, running, and is an avid Spikeball player.

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.

Contact

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EDUCATION

- Western Washington University, BA Finance, Minor in Economics

PROFESSIONAL ORGANIZATIONS

- Association for Corporate Growth (ACG)
- ACG NextGen
- CFA Society of San Diego

COMMUNITY INVOLVEMENT

- San Diego Repertory Theatre, Past President and Board Member (2017 – 2019)