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John M. Peters, CFA, Joins Dowling & Yahnke Wealth Advisors as Lead Advisor

San Diego — November 11, 2021: Dowling & Yahnke Wealth Advisors, currently managing over \$5.7 billion of assets for over 1,300 clients, is pleased to announce **John M. Peters, CFA** has joined our Firm as a Lead Advisor.

John Peters has over twelve years of experience in the financial services industry. He 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 registered investment advisory firms. John holds the Chartered Financial Analyst (CFA) designation. He earned his 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 brings a wealth of investment and planning experience focused on serving high-net-worth clients. We couldn’t be more excited for him to join our team,” states Mike Brown, Lead Advisor and Principal.

“I wanted to join an entrepreneurial, fiduciary-based practice that strives to minimize the conflicts of interest with which our industry is wrought. Dowling & Yahnke has a stellar reputation for client service and commitment to acting in client’s best interests, which I have always admired.” explains John. “It is extremely fulfilling for me to help clients sleep better at night knowing they have a fiduciary steward of their wealth, as well as a plan in place to achieve these goals. The opportunity to work with (and learn from) a diverse group of successful, genuine people is also a major perk of the job.”

John is actively involved with several industry organizations including the Association for Corporate Growth (ACG), ACG NextGen, and the CFA Society of San Diego.

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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