

CONTACT: Mark Muñoz  
Dowling & Yahnke, LLC  
12265 El Camino Real, Suite 300  
San Diego, CA 92130  
Telephone: (858) 509-9500  
mark.munoz@dywealth.com

## Hope Carlson Earns the Chartered Advisor in Philanthropy® (CAP®) Designation

**San Diego, California – April 25, 2022:** Dowling & Yahnke Wealth Advisors (the Firm), currently managing over \$6.1 billion of assets for more than 1,400 clients, is proud to announce that **Hope Carlson, CFP®, CAP®**, has earned the Chartered Advisor in Philanthropy (CAP®) designation.

The CAP® designation brings advisors and fundraisers together to help clients with legacy planning. Advisors with the CAP® designation think both broadly and deeply about philanthropy to help their clients situate their giving in the context of their overall estate and business plans. In turn, this approach increases the impact clients can have across generations in their families and in their communities.

“Dowling & Yahnke has prioritized the importance of knowledge since our founding, and Hope personally exemplifies this core value,” says Mark Wernig, Co-CEO and Principal. “The combination of her impressive background and the attainment of the CAP® designation to bridge the art and science of philanthropic planning will allow her and our broader team to best serve current and future clients.”

Hope Carlson has a passion for making complex financial concepts understandable for all her clients. She takes an empathic approach to planning, deeply listening to her clients’ aspirations and concerns. With significant experience in philanthropy, she also delights in helping clients structure their charitable giving. She is active in the San Diego community as a Board Member for the Harvard Business School Club of San Diego, as part of the Philanthropy Committee at the La Jolla Playhouse, on the Planned Giving Advisory Council of Make-A-Wish® San Diego, and as the Membership Chair for Advisors in Philanthropy, San Diego Chapter.

### **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 \$6.1 billion for more than 1,400 clients, primarily individuals, families, and nonprofit organizations. **For more information, visit [www.dywealth.com](http://www.dywealth.com).**

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