

PEOPLE ON THE MOVE

HIRINGS, PROMOTIONS, BOARD MEMBERS AND SPECIAL ANNOUNCEMENTS IN SAN DIEGO

DOWLING
& YAHNKE
WEALTH ADVISORS

30
YEARS OF
TRUSTED
SERVICE

FINANCE Promotions



Timothy Lee

Timothy Lee

Promoted to Financial Planner

Dowling & Yahnke Wealth Advisors is proud to announce that Timothy Lee, CFP® has been promoted to a Financial Planner. He designs customized financial plans for clients by utilizing his technical skills with an incredible level of care and thoughtfulness, guiding clients through the process of reaching their financial goals.

timothy.lee@dywealth.com



Emily Zerbato

Emily Zerbato

Promoted to Chief Compliance Officer

D&Y is also excited to share Emily Zerbato, IACCP®, has been promoted to Chief Compliance Officer of the firm. She serves an integral role in the ongoing development of the Firm's regulatory compliance program by leading the Firm's Compliance Committee and as a member of the Business Continuity Committee.

emily.zerbato@dywealth.com