

PEOPLE ON THE MOVE

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



FINANCE
Promotions



Matt Adams

Dowling & Yahnke Wealth Advisors, currently managing over \$5.7 billion of assets for more than 1,300 clients, is proud to announce that **Matt Adams, CFP®, CPA, CDFA®; Hope Carlson, CFP®; Jake Erlendson, CFA, CFP®; John Peters, CFA; and Grant Webster, CFP®, CDFA®** are promoted to Principals.

Matt Adams enjoys guiding clients through their own unique tax and estate planning strategy. With his CPA background, he approaches every client situation from a holistic financial planning perspective. This includes an in-depth look at tax driven concepts and ideas that can help clients make informed financial decisions in all aspects of their financial lives. Matt is active as a board member for the Mira Costa College Foundation.



Hope Carlson

Hope Carlson has a passion for making complex financial concepts understandable for all of 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 a Trustee on the Board of The La Jolla Playhouse, on the Planned Giving Advisory Council of Make-AWish® San Diego, and is the Membership Chair for Advisors in Philanthropy, San Diego Chapter.



Jake Erlendson

Jake Erlendson has been an integral part of D&Y for 15 years, oversees the trading operations, and is a key member of the Investment Committee. Jake has extensive experience providing clients with tax-efficient investment portfolios, and advice in the areas of tax and retirement planning. He is a member of the CFA Institute, the CFA Society of San Diego, Inc., and the Estate Planning Council of San Diego. Jake is actively involved with the San Diego Social Venture Partners.



John Peters

John Peters has over twelve years of experience in the financial services industry. He enjoys working with clients to design investment strategies tailored to each client's individual goals and circumstances.



Grant Webster

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

Grant Webster has over thirteen years of experience in the financial services industry. He is an avid writer on financial planning and investment topics and has been featured in numerous publications such as *Forbes*, *The Wall Street Journal*, and *InvestmentNews*. He received the great honor of "40 Under 40" by *InvestmentNews*, Class of 2019.

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POWER
Promotion



Chris McCall

Burns & McDonnell, a 100% employee-owned engineering, architecture and construction firm, promoted **Chris McCall** to lead the firm's Transmission & Distribution Group in California. He is responsible for leading and growing a team of 76 employees who provide safe and reliable power and gas systems for California communities.



LAW FIRM
New Hire



Sabrina D. Johnson

Hecht Solberg Robinson Goldberg & Bagley LLP (HechtSolberg) welcomes real estate and business lawyer **Sabrina D. Johnson** to its Litigation and Risk Management Practice. She has a broad background in litigation and insurance matters, including legal malpractice defense, business disputes and premises liability.

Johnson graduated cum laude from the USD School of Law, where she was a member of the San Diego Law Review. Making the announcement, managing partner Mickey Maher said, "Sabrina's strategic mindset and extensive background in litigation and insurance will complement our expertise handling disputes for clients, as well as managing risk to help them avoid disputes."



INFORMATION TECHNOLOGY & SERVICES
New Hire



Tom Schmitt

Netradyne, a leader in artificial intelligence (AI) and edge computing focusing on driver and fleet safety, has named **Tom Schmitt** as Chief Financial Officer. In his new role, he will oversee the company's financial strategy and operations as the company moves through its next phase of hypergrowth. With over 35 years of financial experience, Tom has played an integral role in driving operational transformation while also creating shareholder value across both startups and large-scale companies. Previously, he held executive and various financial roles at Postclick, VideoAmp, Inc., FreeWheel Media, Inc., Salesforce, NetApp, and GAP, Inc.