

Enjoy Your Life

► Get to know us ([/our-founding-story?width=600&height=500](#))

How can we help you on your financial journey?



(<https://www.dywealth.com/investment-management>)

Investment Management

(<https://www.dywealth.com/investment-management>)

When you work with us, you'll get expert investment managers who monitor your portfolio daily.



(<https://www.dywealth.com/retirement-planning>)

Retirement Planning

(<https://www.dywealth.com/retirement-planning>)

Whether you are building wealth, starting retirement, or leaving a legacy, we can help you stay on track.



(<https://www.dywealth.com/financial-planning>)

Estate Planning

(<https://www.dywealth.com/financial-planning>)

We can review your plan, coordinate with your estate professionals, and facilitate distributions.



(<https://www.dywealth.com/charitable-giving>)

Charitable Giving

(<https://www.dywealth.com/charitable-giving>)

If you give to charity, how can you give in a tax-smart, simple way? Talk to us about the possibilities.

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(<https://www.dywealth.com/executive-equity-and-compensation-planning>)

Executive Compensation Analysis

(<https://www.dywealth.com/executive-equity-and-compensation-planning>)

Stock options and other forms of equity compensation often require planning.



(<https://www.dywealth.com/education-planning>)

Education Planning

(<https://www.dywealth.com/education-planning>)

We can recommend the most appropriate tuition savings option for you, such as a 529 plan.

Close

Awards and Press

Barron's



Top 1200 Independent Financial Advisors MAR 2019

Read More Including Disclosures (<https://www.dywealth.com/resources/news-pdfs-links-external-websites/barron%E2%80%99s-listed-dale-yahnke-2019-top-1200-financial>)

Barron's



Top 100 Independent Financial Advisors SEP 2018

Read More Including Disclosures (<https://www.dywealth.com/resources/news-pdfs-links-external-websites/dale-yahnke-ranked-27-barron%E2%80%99s-top-100-independent>)

Charles Schwab & Co., Inc.



SOLUTIONS® Operational Excellence Award
AUG 2018

Read More Including Disclosures (<https://www.dywealth.com/resources/news-pdfs-links-external-websites/dowling-yahnke-recognized-schwab-advisor-services-2018>)

Financial Times



Top 300 Investment Advisers
JUN 2018

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Dowling & Yahnke Founding Story



[Recent Blog Posts \(https://www.dywealth.com/resources/blog/all-blog-posts\)](https://www.dywealth.com/resources/blog/all-blog-posts)

Strategies for College Grads with Soft Majors (/resources/blog/strategies-college-grads-soft-majors)

Posted by Dowling & Yahnke Staff on 06/28/2019

Here are four tips that will help graduates to become much more marketable and give them an earnings boost if they choose a soft major.

[Read more... \(/resources/blog/strategies-college-grads-soft-majors\)](/resources/blog/strategies-college-grads-soft-majors)

12 Tips for a Great Vacation (/resources/blog/12-tips-great-vacation)

Posted by Dowling & Yahnke Staff on 06/13/2019

With the summer travel season upon us, here are 12 tips to make your vacation a memorable one.

[Read more... \(/resources/blog/12-tips-great-vacation\)](/resources/blog/12-tips-great-vacation)

Six Things You Need to Know About the College Admission Process (/resources/blog/six-things-you-need-know-about-college-admission-process)

Posted by Dowling & Yahnke Staff on 03/26/2019

The college admission scandal that hit the press recently generated a tremendous amount of outrage, as well as endless questions about the entire college process.

[Read more... \(/resources/blog/six-things-you-need-know-about-college-admission-process\)](/resources/blog/six-things-you-need-know-about-college-admission-process)

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We'd love to meet with you!

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