CCP | CLEARWATER CAPITAL PARTNERS

Melissa Dailey-Newman, CDFA®, AWMA®

Wealth Advisor

Melissa Dailey-Newman, CDFA®, AWMA®, is a wealth advisor at Clearwater Capital Partners and a voting member of the firm's Investment Policy Committee. Melissa's focus includes advising successful professionals on wealth accumulation and estate planning, serving widows and near retirees with their retirement income needs, and helping families continue their legacies by successfully managing their wealth from generation to generation.

Melissa is a dynamic leader within the women and wealth community, currently serving as Co-Leader of the Chicago chapter of Women in ETFs (WE) and as Board President of the Kansas City chapter of Women in Insurance and Financial Services (WIFS). She is the creator and inspiration of CHIConWallStreet, a platform dedicated to empowering women on their personal journey towards financial independence and helping others navigate life events such as career transitions, divorce, and the death of a loved one.

Melissa's career in the financial industry began in 1999 and spans many areas of expertise, including broker-dealer operations management, registered principal and branch supervision, advisor recruitment, and practice management. She has experience providing advice and guidance to both retail and institutional clients across a range of investment strategies, including long-term care planning, nonprofit foundations and endowments, 529 college savings plans, and both qualified and non-qualified retirement plans. Melissa is a public speaker and frequent facilitator of investment strategy webinars and client events, and an active mentor with the Harper College Corporate Mentorship Program.

Originally from the Chicagoland area, Melissa attended Emporia State University on a vocal music scholarship and now resides in Leawood, KS, with her husband, Brian, and son, Garrett. Her daughter, Madeline, is a graduate of Johnson and Wales University and currently lives in Denver, CO. Melissa enjoys golfing, playing piano, watching sports, and spending time with friends and family.

Melissa has obtained the Accredited Wealth Management Advisor® certification through the College for Financial Planning and the Certified Divorce Financial Analyst® certification through the Institute for Divorce Financial Analysts.

Specializing In

- Wealth in Transition due to Divorce or Loss of Loved One
- Intergenerational Wealth Management Strategies
- Retirement Planning
- Divorce Planning

Focus Clients

- High Net Worth Individuals and Multigenerational Families, Women in Wealth, Seniors

Explore the latest thought leadership and market insights from Melissa at ccpwealth.com/insights

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