



Katie L. Berganske-Frank

Chief Revenue Officer

Katie Berganske Frank is the Chief Revenue Officer of Clearwater Capital Partners and the first female executive member of the firm's Operating Committee.

In her position as Chief Revenue Officer, Katie plays a pivotal role in directly guiding Clearwater's long-term growth strategies. She is responsible for the development and implementation of the firm's business development initiatives, client experience standards, and directing the firm's brand messaging across all channels. Katie plays a central role in communicating the firm's mission to make a life-changing impact in the lives of clients and their families.

Prior to joining Clearwater Capital Partners, Katie served as the Director of Sales and Marketing for AmCheck, later purchased by iSolved. There she spent ten years focusing on organizational human capital through integrated payroll systems. Katie's career spans twenty years of business development and marketing experience serving small and large organizations, as well as the nonprofit sector.

Katie's leadership has been recognized by the business community with numerous honors, including Leader of the Year and Woman of the Year through the Schaumburg Business Association. In 2022, Katie also received the distinguished Influential Woman in Business recognition from the Daily Herald.

Katie serves as Executive Director of the Clearwater Capital Foundation, where she leads the firm's philanthropic vision and community impact initiatives. She also convenes and facilitates the Nonprofit Alliance group serving nonprofits in and around the Chicagoland community and contributes her expertise as a board member of the District 54 Foundation.

Katie has dedicated time to mentoring young adults, including prior involvement with the Harper College Educational Foundation's Corporate Mentorship program, and continues to mentor business owners through the Schaumburg Business Association. She has a passion for inviting women into wealth conversations and empowering them at every stage of their financial journey, sharing her career and life experiences to inspire confident, intentional action toward their financial future.

Katie grew up in Homer Glen, Illinois, and graduated from Illinois State University, studied abroad at the University of Western England, and received a degree in Business Management with an emphasis in Marketing. She lives in Schaumburg with her husband Matt and their children. Outside of work, Katie most values unhurried time with her family and close friends and enjoys experiences, including travel, that create meaningful connections and perspective.



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Investment Advice offered through Clearwater Capital Partners a Registered Investment Advisor.

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