



James F. Chapman, AWMA®

Partner
Chief Innovation Officer
Senior Wealth Advisor

James Chapman joined Clearwater Capital Partners in 2014 and works directly with successful individuals and families, including entrepreneurs, medical professionals, retirees, and charitable foundations. He specializes in comprehensive financial planning, intergenerational wealth transfer, and lifetime income modeling, with a focus on serving the next generation.

As Chief Innovation Officer, James leads strategic initiatives and directs the firm's technology and client experience, including the launch of Clearwater Capital's mobile app and Aura Cybersecurity Platform. He previously served as Executive Director of the Clearwater Capital Foundation and is the chairman of the foundation's Supercar Show, which has raised nearly \$300,000 for local charities. He also serves on the board of A Giving Heart Foundation.

James earned a Finance degree from Illinois State University, earned the AWMA® designation, and became a licensed Investment Adviser Representative at 19. He has completed executive programs at the Wharton School of the University of Pennsylvania, UCLA Anderson School of Management, and Charles Schwab & Co., further honing his leadership and behavioral finance expertise.

Based in Arlington Heights, Illinois, James is active in the Chicago exotic car community and enjoys motorsports, including snowmobiling in Michigan's Upper Peninsula.



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

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