



John E. Chapman

Chief Executive Officer
Chairman of the Board
Chief Investment Strategist

John Chapman is the Chief Executive Officer of Clearwater Capital Partners and serves as the firm's Managing Partner. With forty years of Wall Street experience, John directs all wealth management and advisory services for the firm, is the firm's Chief Investment Strategist, and chairman of the firm's Investment Policy Committee.

John began his Wall Street career with Merrill Lynch in the early 1980s as a Financial Consultant. In the years to follow, John assumed various management positions and, by 1992, became the National Sales Manager and Director of Consulting Services for Chase Manhattan Investment Services. In 1996, he joined Chicago-based EVEREN Securities, which would later be acquired by First Union, Wachovia Securities, and eventually Wells Fargo Advisors. During these years, John was the Senior Vice President and Director of Education. In this role, John led the Professional Development Group for one of the nation's largest full-service brokerage firms. Prior to founding Clearwater Capital Partners, John was a Senior Managing Director for RBC Dain Rauscher.

John has a Bachelor of Science degree in Finance from the University of Illinois, Urbana-Champaign. He is a graduate of the Certified Investment Management Analyst program, sponsored by IMCA in association with the Wharton School at the University of Pennsylvania. In 1998, he became a graduate of the Securities Industry Institute and the Securities Industry Association's Branch Management Leadership Institute at Wharton. He also completed Executive Leadership and Strategy programs at the University of Chicago's Graduate School of Business.

In 2008, John earned the Accredited Investment Fiduciary® designation through the Center for Fiduciary Studies in association with the University of Pittsburgh Joseph M. Katz Graduate School of Business. In 2012, John completed the Retirement Management program at Boston University's Center for Professional Education and, in 2013, received a certificate in Advanced Investment Strategy from IMCA.

John lives in Palatine, Illinois, with his wife, Julie. He is a member of the Harper College Educational Foundation Board of Directors and a former member of the Advocate Sherman Hospital Board of Directors. John is also an active board member of the Clearwater Capital Charitable Foundation. When not working, John enjoys reading, his dog Sophie, and spending time with his family at their lake house in Michigan's Great Northwoods.



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



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

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