



Greg W. Davis, CFP®, CTFA

Senior Partner
Senior Wealth Advisor

Greg Davis is a Senior Wealth Advisor and Senior Partner at Clearwater Capital Partners. As a CERTIFIED FINANCIAL PLANNER™ professional and Certified Trust Financial Advisor (CTFA) with a unique work history of over 35 years within the financial industry, Greg's varied experiences have provided him with the opportunity to serve as an advisor to high-net-worth individuals and families, closely-held and family-owned businesses, trusts, and foundations.

Greg began his career in Vienna, Austria, working in capital markets as a foreign exchange broker for an Austrian company (Eurowien Ltd.). Soon thereafter, he was promoted to a senior broker position in Budapest, Hungary. When Greg returned to the U.S., he continued in foreign exchange as a Senior Foreign Exchange Dealer for the former First National Bank of Chicago (now part of JPMorgan Chase).

Greg transitioned to the wealth management area as a Vice President – Trust Advisor within JP Morgan Private Client Services, where he could finally begin to fulfill his passion for helping individuals and their families meet and exceed their financial goals. In this role, Greg became the primary contact for over 60 high-net-worth individuals and families, assisting them with their specific trust, estate, and investment planning needs.

A few years later, BMO Harris Private Bank sought him out to fill the role of Director-Wealth Advisor. In this role, Greg was responsible for delivering integrated wealth management solutions as the lead relationship manager for high-net-worth individuals and families, each with varying and unique situations.

Greg received a Bachelor of Science (B.S.) Degree in Finance with Honors from the University of Illinois in Urbana-Champaign, as well as a Master of Business Administration (MBA) with High Honors concentrating in Finance from the Kellstadt Graduate School of Business at DePaul University. Besides being a CFP® Professional and receiving the CTFA designation listed above, Greg also has an Illinois Health and Life Insurance license. Greg's strong background and experience make him a major asset for CCP as a unique thought leader across multiple areas. Greg is also a voting member of the firm's Investment Policy Committee.



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



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

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