



Jeffrey P. DeHaan, CFP®, CDFA®, AIF®, AWMA®

Managing Partner, Private Wealth Management

Jeffrey DeHaan, CFP®, is the Managing Partner of Private Wealth Management at Clearwater, where he leads the team and oversees the firm's comprehensive service offerings. As a voting member of the firm's Investment Policy Committee, Jeff's insights and perspectives help shape Clearwater's investment strategies. As Clearwater's longest-tenured employee, Jeff works closely with a select group of accomplished business owners, professionals, and their families to help them realize their unique financial goals. He emphasizes the interconnectedness of portfolio management, retirement planning, gift and estate planning, and risk management, providing clients with a clear path to their objectives and a robust decision-making framework.

Jeff also serves on the firm's Board of Directors and Operating Committee, and holds the role of Chief Compliance Officer. In 2021, Jeff was honored as an InvestmentNews 40 Under 40 Honoree, recognizing his leadership and achievements in wealth management. In 2022, he received the Family Wealth Alliance's Young Professionals Award for his success and industry contributions. In 2025 and 2026, he was named a Top Advisor by InvestmentNews.

Jeff graduated with Highest Honors from the University of Illinois at Urbana-Champaign, earning dual Bachelor of Science degrees in Finance and Business Administration. His academic excellence earned him induction into Beta Gamma Sigma, the national business honor society, awarded to the top 10% of graduates in accredited business programs. Membership in Beta Gamma Sigma represents the highest distinction for business students in programs accredited by the Association to Advance Collegiate Schools of Business International.

In 2014, Jeff earned the CERTIFIED FINANCIAL PLANNER® designation after completing the required coursework through Northwestern University's School of Continuing Studies and passing the CFP Board's certification examination. His professional development also includes the Accredited Wealth Management AdvisorSM (AWMA®) certification from the College for Financial Planning and the Accredited Investment Fiduciary® (AIF®) certification from the Center for Fiduciary Studies, in association with the University of Pittsburgh Joseph M. Katz Graduate School of Business. Jeff is also a Certified Divorce Financial Analyst (CDFA®), a designation specializing in guiding clients through the complexities of divorce planning.

Jeff is deeply engaged in his community, serving as Board Chair of the Community Foundation for McHenry County. He also sits on the Board of Directors for Leadership Greater McHenry County, where he co-chairs the Curriculum Committee. Previously, Jeff was a member of the City of Crystal Lake's Economic Development Committee, served as Past President on the Board of Directors for the United Way of Greater McHenry County, and was the Treasurer for Crime Stoppers for Greater McHenry County. In recognition of his leadership, community involvement, and professional achievements, Jeff was named one of McHenry County's Best Under 40 by the McHenry County Business Journal in 2013 and became an Edgar Fellow in 2018. He resides in Lakewood, IL, with his wife and two children.



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



2800 W Higgins Road, Suite 1025 | Hoffman Estates, IL 60169

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

ccpwealth.com/jeffrey-p-dehaan