

CCP

CLEARWATER CAPITAL PARTNERS

Greg W. Davis

Greg Davis is a Partner - Senior Wealth Advisor at Clearwater Capital Partners. As a CERTIFIED FINANCIAL PLANNER™ professional and Certified Trust Financial Advisor (CTFA) with a unique work history of over

30 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, 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.) and 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 a part of JP Morgan 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 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 Masters 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 CFTA designation listed above, Greg also has an Illinois Health and Life Insurance license. Greg's strong background and experience makes him a major asset for CCP as a unique thought leader across multiple areas. Greg is a voting member of the firm's Investment Policy Committee.

Greg resides in Palatine, Illinois with his wife, Marina. They have four children – a son and daughter working in the Chicago area, and boy-girl twins in college. Greg is deeply engaged in community service, serving as the Executive Director of the Clearwater Capital Foundation (the charitable arm of CCP), Board Development Director for the Bridge Youth and Family Services in Palatine, and an active board member for the Northwest Suburban Estate Planning Council.



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“Ultimately, its simple. An unwavering commitment to clients, excellence, and integrity—the foundation for all that we do.”

-Greg Davis

Investment Advice offered through Clearwater Capital Partners A Registered Investment Advisor