Valerie N. Hogan, J.D., CFP®, CEPA®

Wealth Advisor, Family Office Services

Valerie N. Hogan, J.D., CFP®, CEPA®, serves as a Wealth Advisor in Family Office Services at Clearwater Capital Partners, where she advises ultra-high-net-worth individuals, enterprising families, founders, and multi-generational wealth stewards. Her work sits at the intersection of enterprise strategy and personal wealth architecture, with a particular focus on clients navigating concentrated or illiquid assets.

With a foundation in law spanning contracts, tax, estate structuring, and litigation risk, Valerie brings structural fluency to complex financial lives. As a registered patent attorney, she has worked at the intersection of intellectual property and enterprise value, giving her a distinctive lens on business ownership and value creation. She further deepened her expertise in recapitalization and exit dynamics through executive education in Venture Capital and Private Equity at Columbia Business School.

Valerie is a CFP® professional, Series 65 fiduciary, and Certified Exit Planning Advisor (CEPA®). She serves as a strategic partner to families navigating liquidity events, succession planning, and generational capital transitions, ensuring alignment across investment strategy, estate planning, and long-term objectives.

A defining element of Valerie's practice is her specialization in complex asset philanthropy. She advises clients on the charitable transfer of closely held business interests, private equity positions, partnership stakes, and other non-marketable assets, integrating tax efficiency, estate strategy, and philanthropic intent into a cohesive plan.

Prior to joining Clearwater Capital Partners, Valerie held leadership roles at National Christian Foundation Chicago, where she served as Relationship Manager and later co-Managing Partner. She also co-founded Orchard Ministry Development and continues to serve on its Board, providing strategic guidance on non-cash and legacy giving.

Valerie's commitment to stewardship extends beyond her advisory work. Alongside her mother, Miriam Neff, founder of Widow Connection, she co-authored a book and co-hosts a nationally syndicated radio feature focused on fraud prevention, budgeting, and financial literacy.

She earned a Bachelor of Science in Biology with a minor in Chemistry from Liberty University and a Juris Doctor from Concord Law School at Purdue University. She also completed the CERTIFIED FINANCIAL PLANNER® education program through Northwestern University. Her early career includes work with the Christian Law Association, and she has been actively involved in financial stewardship education since 2000, leading programs through organizations such as Crown Financial and Financial Peace University.

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

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