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CLEARWATER CAPITAL PARTNERS

Josh Beachler, CFP® , AWMA®

Joshua M. Beachler is a Wealth Advisor at Clearwater Capital Partners. Josh joined the firm in 2019 after beginning his Wall Street career with Merrill Lynch. At Merrill Josh gained experience in client management, wealth planning, and business development. In 2018 Josh, along with other top advisors across the country, was invited to attend the Merrill Lynch Financial Advisor Development Program (FADP) Excellence Conference in Dallas, Texas.

After three years of service, Josh recognized that the financial services industry was evolving rapidly, and clients were seeking a meaningful standard of care; this ultimately led him to Clearwater Capital Partners.

Now, Josh works closely with the executive partners on family office relationships and working with the next generation of wealth. Josh's clientele ranges from doctors, tech leaders, to corporate executives.

In 2022, Josh earned the CERTIFIED FINANCIAL PLANNERTM designation after completing the required course work and passing the CFP Board certification examination. Josh also holds the Accredited Wealth Management AdvisorSM(AWMA®) certification through the College for Financial Planning.

Josh graduated Magna Cum Laude from Taylor University in 2016 with a Bachelor of Science in Finance and a minor in economics. Josh was a member of the investment team for Taylor University's Endowment Fund where he researched and reported on international and domestic equities. In addition to his academic studies, Josh was a four-year starter on the Men's soccer team and was named to the 2014 and 2015 Capital One Academic All-District team. He was also team captain his senior year and a NAIA Scholar Athlete.

Josh resides in Chicago, IL. In his free time, Josh enjoys staying active and traveling abroad, visiting England, Brazil, Spain, Portugal, and Germany in the last 3 years. Josh also volunteers on the Associate Board for GRIP Outreach for Youth in downtown Chicago.



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Wealth Advisor

Josh.Beachler@ccpwealth.com

Call (847) 841-8650
Text (847) 616-2855

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affords clients the ability to
pursue the things they are
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