

CCP

CLEARWATER CAPITAL PARTNERS

Jeffrey P. DeHaan, CFP®

Jeffrey DeHaan, CFP® is a Partner and Senior Wealth Advisor with Clearwater Capital Partners. Jeff is also a voting member of the firm's Investment Policy Committee where his insights and perspectives help shape CCP's investment strategies. As Clearwater's longest tenured employee, Jeff works primarily with a select group of successful business owners and professionals, along with their families, to achieve their unique visions of their financial futures. Focusing on the interdependence between portfolio management, retirement planning, gift planning, estate planning and risk management, Jeff endeavors to give his clients a clear path to their goals and a solid framework for decision making. Additionally, Jeff serves on the firm's Board of Directors, Operating Committee and as the firm's Chief Compliance Officer where he works to develop firm wide policies to safeguard client assets and information while meeting regulatory requirements. In 2021, Jeff was recognized as a 40 Under 40 Honoree by Investment News, reflecting his achievements in the wealth management industry.

Jeff graduated with Highest Honors from the University of Illinois, Urbana-Champaign, with two Bachelor of Science degrees in Finance and Business Administration. Excelling in the field of finance, his special interests included modern portfolio theory and construction, macroeconomic principles, and personal wealth management. Jeff's academic success led to an invitation to join Beta Gamma Sigma national business honors fraternity, having been in the top 10% of his graduating class. Membership in Beta Gamma Sigma is the highest recognition a student can receive in a business program accredited by The Association to Advance Collegiate Schools of Business International.

In 2014, Jeff earned the CERTIFIED FINANCIAL PLANNER™ designation after completing the required course work through Northwestern University's School of Continuing Studies and successfully passing the CFP Board's certification examination. Jeff's professional development also includes the Accredited Wealth Management AdvisorSM (AWMA®) certification through the College for Financial Planning and the Accredited Investment Fiduciary® (AIF®) certification through 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 certification focused on guiding clients through the process of divorce.

Jeff is active in his community as a member of the Leadership Greater McHenry County Board of Directors, chairing the Curriculum Committee. He's also a former member of the City of Crystal Lake's Economic Development Committee and served on the Board of Directors of the United Way of Greater McHenry County as past President. Jeff is also the current Treasurer for Crime Stoppers for Greater McHenry County. As a result of his community involvement, leadership and professional accomplishments Jeff was named one of McHenry County's Best Under 40 by the McHenry County Business Journal in 2013 and was named an Edgar Fellow in 2018. He currently resides in Lakewood, Illinois with his wife and two children.



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*"Dedicated, unbiased,
independent advice is our
product. Confidence can't
be sold."*

-Jeffrey DeHaan

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