



CLEARWATER
CAPITAL PARTNERS

Katie Berganske-Frank

Katie Berganske-Frank is the Chief Revenue Officer of Clearwater Capital Partners and the first female executive member of the firm's Operating Committee.

In her position as Chief Revenue Officer, Katie plays a pivotal role directly guiding Clearwater's long-term growth strategies. She is responsible for the development and implementation of the firm's business development initiatives, client experience standards, and directing the firm's brand messaging across all channels.

Katie's efforts are the primary driver for sharing the firm's mission of making life-changing impact in the lives of our clients and their families.

Prior to joining Clearwater Capital Partners, Katie served as the Director of Sales and Marketing for AmCheck, later purchased by iSolved. There she spent ten years focusing on organizational human capital through integrated payroll systems. Katie's career spans twenty years of business development and marketing experience serving small and large organizations, as well as the nonprofit sector.

Katie's leadership has been recognized by the business community with numerous honors including Leader of the Year, and most recently Woman of the Year through the Schaumburg Business Association. Also in 2022, Katie received the distinguished Influential Woman in Business recognition from the Daily Herald.

Katie is a member of the board for the District 54 Foundation, runs the Nonprofit Alliance group serving nonprofits in and around the Chicagoland community, and is a committee member of the Clearwater Capital Foundation where she is slated to become the Executive Director in 2024.

Katie enjoys spending time mentoring young adults and has been aligned to the Harper College Educational Foundation's Corporate Mentorship program since its inception. Along with that, Katie has a passion for empowering women in wealth at all stages of their financial journey. She enjoys sharing her career and life experiences with women to inspire them take action in creating a confident financial future.

Katie grew up in Homer Glen, Illinois and graduated from Illinois State University, studied abroad at the University of Western England, and received a degree in Business Management with an emphasis in Marketing.

She lives in Schaumburg with her husband Matt and their children. Katie enjoys reading, the occasional glass of great wine, and spending quality time with her family.



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Chief Revenue Officer

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"We are a trusted partner to those seeking clarity on how wealth is created, sustained, and protected."

-Katie L. Berganske-Frank

Investment Advice offered through Clearwater Capital Partners A Registered Investment Advisor