



John Ellis, QKA®

Retirement Plan Analyst

John has over 28 years of experience in the retirement plan and employee benefits industry. He has established a strong reputation as a knowledgeable and reliable consultant, specializing in defined contribution plan administration, client support, and plan oversight. Throughout his career, John has been dedicated to ensuring regulatory compliance while also improving plan health and participant outcomes.

John specializes in designing and implementing tailored retirement plans, managing teams, and optimizing processes to enhance operational efficiency. He consistently delivers high-quality solutions, emphasizing strategic guidance and compliance, while continuously improving plan design and execution.

Before joining Clearwater Capital Partners, John spent 21 years at First American Bank, where he held roles such as Vice President, Retirement Plan Consultant, and Employee Benefits Recordkeeping and Administration Manager. His experience in these positions has honed his ability to guide organizations through complex regulatory landscapes and build strong, lasting client relationships.

John earned his Bachelor's degree in Finance with a minor in Economics from Western Illinois University. He also holds the Qualified 401(k) Administrator (QKA®) credential, a mark of his deep understanding and proficiency in managing the complexities of retirement plan administration.



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Investment Advice offered through Clearwater Capital Partners a Registered Investment Advisor.

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