



2023

Generosity Report



Our Mission

Improving lives and inspiring generosity for exponential impact.



Our Foundation Committee



Greg Davis
Executive Director



James Chapman
Former Executive Director



Katie Berganske-Frank
Executive Director Elect



Danuta Garb
Finance & Regulatory Co-Chair



Kevin Carani
Grant Committee Chair



Melissa Dailey-Newman
Kansas City Chair



Founded on Stewardship

Stewardship has been at the core of Clearwater Capital Foundation for over 18 years.



*Clearwater Capital Foundation
Founded in 2006*

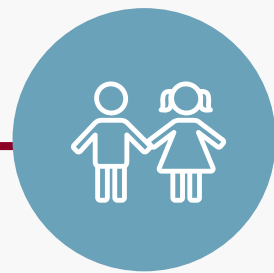


Giving Pillars

Grants can be utilized to fund education or scholarships for children, to address global justice issues around gender equality, to provide job training, career opportunities, financial education and economic resources for women.



Financial Empowerment



Women & Children



People in Need



Veterans



Employee Participation

We're proud to celebrate a remarkable milestone: **100% of our employees have contributed to our foundation.** This achievement reflects the unwavering commitment, generosity, and shared values of our team.

Together, we're creating meaningful change, supporting impactful initiatives, and demonstrating the strength of our collective purpose. It's a testament to the heart of our company and the incredible people who make it all possible.



Global Impact

This showcases the significant impact of our fundraising efforts, and the total amount raised with its transformative effects. Through the generosity of our donors and the dedication of our community, we've made strides in addressing critical needs both globally and locally.



Grant dollars distributed:

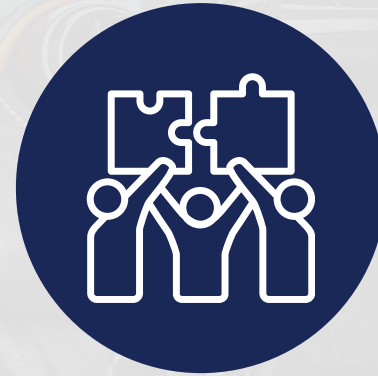
\$104,940



Vision Forward



Contribute 1% of Annual Gross Revenue to the Foundation



Work toward an exponential increase in annual grant funding



Continue to develop a culture of giving with 100% employee participation



Our Impact

Thanks to the Clearwater Capital Foundation, we've made a meaningful impact on our community and the world in ways that go beyond measure. Through grants, employee matching programs, and dedicated volunteering, we've supported over 28 charities and extended a helping hand to countless individuals we may never meet—but whose lives we've touched with purpose and a shared commitment to the greater good.



28
Charities Impacted

∞
impacted Lives



2023 Highlights



Achieved 100% employee participation, demonstrating our team's shared commitment to giving back.



Focused grants on financial empowerment, aligning with our core values of long-term commitment and catalytic results.



Supported a diverse portfolio of causes impacting local communities and global initiatives.



Our Values in Action



INNOVATION & EVOLUTION

Fresh solutions to address changing needs



LONG-TERM COMMITMENT

Strategic partnerships for sustainable change



SOCIAL CAPITAL

Joining with clients and stakeholders for collective change



CATALYTIC RESULTS

Inspiring generosity for multiplied impact





Thank You

📍 Hoffman Estates, Illinois

🌐 www.ccpwealth.com/ccf

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