



## Phillip A. McCloskey

Private Wealth Associate

Phillip McCloskey is a Private Wealth Associate at Clearwater Capital Partners, where he supports the delivery of personalized, comprehensive financial guidance to individuals and families. He currently works within the firm's Advanced Planning Team and is rotating through multiple departments, as part of Clearwater's Advisor in Residency program, to build a deep understanding of Clearwater's investment, planning, and client service processes. Phillip graduated in 2025 with a Bachelor of Science in Personal Finance from the University of Wisconsin–Madison, where he was named to the Dean's Honor List every semester. While at UW–Madison, he was actively involved in the financial planning community, including competing in the Financial Planning Association's national case competition and attending the CFP Board's Connections Conference in Chicago. His academic foundation reflects a strong commitment to both technical excellence and real-world application in financial planning.

Prior to UW–Madison, Phillip earned an Associate in Arts degree in Economics and Pre-Business from Madison Area Technical College. During his time at MATC, he was a member of the men's soccer team and received recognition for both his academic achievement and his contributions on the field. In addition to his academic background, Phillip brings hands-on business experience from managing a lawn care company and from a previous internship at Third Coast Advisors, where he gained exposure to advisory operations. Phillip's dedication to leadership, service, and personal responsibility is further reflected in his achievement of the rank of Eagle Scout. He brings these values into his professional work and is committed to continued growth as he builds a career centered on thoughtful service and long-term client relationships.



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