

ClearTrack

— FINANCIAL ADVISORS —



PETER DALES, AIF®

FINANCIAL ADVISOR AND BRANCH MANAGER, RJFS
MANAGING PARTNER, CLEARTRACK FINANCIAL ADVISORS

Peter is the co-founder, and co-owner of ClearTrack Financial Advisors and branch manager for our practice, which clears through Raymond James. He has more than 26 years of experience in the financial services industry and holds Series 7, 24, 63 and 65 securities licenses as well as insurance licenses (health, life and annuities). He helps his clients manage their wealth and pursue their goals through comprehensive financial planning. Clients maintain a documented investment plan, and follow disciplined asset allocation and diversification. He communicates with his clients on a regular basis to help inform and educate them on all financial matters in a straightforward and transparent manner. After he finished his first full year at ClearTrack Financial Advisors, and every year thereafter, Peter was named to Raymond James Financial Services “Executive Council” (2017 – 2020) in recognition of his dedication and service to clients and high level of professional performance. Peter earned the Accredited Investment Fiduciary® (AIF®) designation in 2020. An

AIF® has completed a course on ethical behavior and fiduciary services. The advisors have learned to balance their business interests against a client-first (or fiduciary) approach.

Before founding ClearTrack Financial Advisors in January 2016, Peter served as a Vice President - Investments with Wells Fargo Advisors (and its predecessor, Wachovia Securities). At Wells Fargo Advisors, he was designated a "Premier Advisor," a distinction that reflected Peter's achievement of professional success by demonstrating a high level of production and a commitment to professional service. Prior to starting as a financial advisor, Peter was an investment banker at Banc of America Securities and a corporate banker at Bank of America. Before entering the financial services industry, he earned an MBA from the University of Illinois, where he also taught a management course to undergraduate business students. Prior to graduate school, Peter worked as an accountant at Price Waterhouse. He passed the Certified Public Accountant (CPA) exam while at Price Waterhouse. He holds a bachelor's degree in business administration from the University of Notre Dame, where he graduated with Honors.

Peter grew up in Sheboygan, Wisconsin, and was a gifted athlete in high school. He was captain of the Sheboygan North basketball team in 1983-1985, the first two teams in school history that made the state tournament in Madison. During high school, Peter traveled to California and served as a counselor at Coach John Wooden's Basketball Camp. One of his favorite memories was meeting and spending time with legendary UCLA Basketball Coach, John Wooden.

Peter lives in Glenview, Illinois, with his wife, Patty, and sons, Peter, John and Steven. In his free time, Peter enjoys watching his sons' athletic competitions in water polo, swimming, and basketball. He is a fan, shareholder and season ticketholder of the Green Bay Packers, a fan of Notre Dame football and the Chicago Cubs. He also coached all of his sons in various sports. Peter is an active member of Our Lady of Perpetual Help Church and the Chamber of Commerce in Glenview, and a

past board member of the Girl Scouts of Chicago. Peter also belongs to The Economic Club of Sheboygan.

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