CREVELING & CREVELING
Private Wealth Advisory

Helping Expatriates Make Smart Financial Decisions

Media Kit

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Chad Creveling, CFA

Peggy Creveling, CFA

Areas of Expertise

As globally recognized experts on financial planning—and as long-time expats ourselves—we, Chad and Peggy Creveling, have the experience to provide targeted and thoughtful insight on issues that matter to the expat community. If you're looking for an informed, balanced source for a story relating to expat financial concerns, you are welcome to contact us. We'll be happy to talk with you and answer your questions. If we can't provide the information you need, we'll refer you to one of our contacts in the financial planning and investment community who we think can help you.

We are particularly well positioned to comment on current financial planning topics, including the following:

Simplifying Financial Affairs

Living or pursuing a career overseas can be exciting and filled with adventure, but it can also add several layers of complexity to a person's financial affairs. We can highlight things expats can do to simplify the management of their finances, save time, and remove some of the stress so that they can focus on the more enjoyable aspects of expat life.

Taxes Americans Need to Know About Before Investing Offshore

Investing in offshore markets can quickly turn into a tax nightmare for a U.S. citizen abroad. We can discuss what expats can do to avoid subjecting themselves to the IRS's punitive Passive Foreign Investment Company (PFIC) rules.

Things to Consider Before Buying Overseas Property

Many expats wonder when (or if) they should purchase property while living overseas. While owning overseas property can be rewarding, it can also have a major impact on an expat's finances. We can explain some of the issues expats should consider before buying real estate in a foreign country.

Choosing an Expat Healthcare Plan

Expats may think the private health insurance they've purchased will protect them if they get sick overseas. But these plans may contain loopholes and exclusions that cause problems if an expat must make a claim. We can provide insight on things expats can do to to cover the cost of health care if they fall seriously ill while living abroad.

Becoming a Household CFO

Whether they're experienced "old hands" or relatively new to living overseas, managing household finances can be complex for expat couples. We can explain how having one spouse serve as a "household CFO" makes it easier to manage the family's financial affairs.

Top Five Investment Mistakes Expats Make

Long-term investing success rests on avoiding the big mistakes and following a properly designed investment plan over time and through all market conditions. Unfortunately, many expat investors make investment mistakes that inhibit their investing success. We can highlight the biggest investment mistakes expats make and explain how to avoid them.

Retirement Plan Options for U.S. Expats

Americans working overseas as contractors, sole proprietors, or small business owners may think that there are few U.S. tax-advantaged choices available to help them save for retirement. However, there may be several alternatives from which to choose. We can discuss some of the retirement planning options available to expats and offer tips on how to choose the best plan.

In the News

Creveling & Creveling has been featured in the following:

TAB Magazine—
Journal of the American Chamber of Commerce in Thailand

OffshoreRed

Expat Women

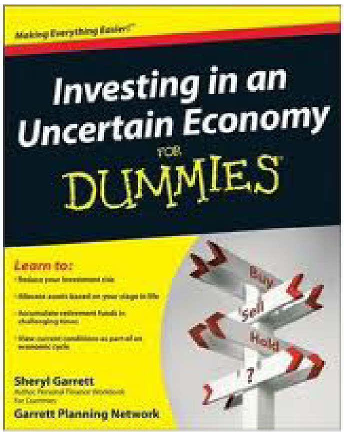
The Wall Street Journal

The American Women's Club of Thailand Newsletter

Mintlife

Acclimate Magazine

The Brief Magazine
British Chamber of Commerce, Thailand



Acclimate Magazine

Morningstar

Chad Creveling, CFA

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Chad is the Managing Director of Creveling & Creveling Private Wealth Advisory. In this role, he provides comprehensive financial planning and investment advice to expatriates and their families throughout Thailand and the Southeast Asia region. An experienced finance professional and long-time expatriate, Chad has a unique understanding of the financial issues and challenges faced by expatriates. He combines this insight with an exceptionally high level of dedication, a clear communication style, and a genuine desire to help his clients attain their financial and life goals.

Chad began his career in finance in 1993 as an equity analyst and later as head of research serving institutional clients at such firms as W.I. Carr (Far East) and Asset Plus Securities. He was a member of the top-ranked analyst team in Thailand from 1994–1996 and a ranked analyst in various AsiaMoney and Institutional Investor polls. Chad now helps his private clients make sound financial decisions and acts as a staunch advocate for them in an increasingly complex and predatory financial service industry.

Prior to entering the finance profession, Chad served as an Infantry Officer with the U.S. Army. He was a Distinguished Graduate from the United States Military Academy at West Point where he studied Russian and Engineering and received a Bachelor of Science degree in 1986. After three years of graduate-level finance work, he was also awarded the Chartered Financial Analyst (CFA) designation in 1996. In addition, Chad has been certified by the Certified Financial Planner Board of Standards, Inc. to advise on U.S.-related financial planning matters.

Chad came to Thailand in 1993 on an internship after completing the first year of Stanford Business School's MBA program. After taking a one-year leave of absence from the program to gain international experience, Chad and his wife decided to make the move to Thailand permanent and pursue a career in Asia.

Chad is a former Airborne Ranger, a member of MENSA, and an avid traveler. In his free time, he enjoys skiing, various fitness sports and dancing salsa with his wife.

Education

- Distinguished Graduate, United States Military Academy, West Point – 1986
- Stanford Graduate School of Business (1 year) – 1992-1993

Certifications and Designations

- Chartered Financial Analyst (CFA) – 1996
- Certified by the Certified Financial Planner (CFP®) Board of Standards, Inc., to advise on U.S. financial planning matters

Memberships and Affiliations

- Member, CFA Institute and Founding Member, CFA Society of Thailand
- Member, Financial Planning Association (FPA) International
- Associate Member, NAPFA
- Member, American Chamber of Commerce, Thailand (AMCHAM)

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Peggy is Executive Director of Creveling & Creveling Private Wealth Advisory. In this role, she provides integrated financial planning and investment advisory services to expatriates and their families throughout Thailand and the Southeast Asia region. As an experienced finance professional and long-time expatriate, Peggy possesses a unique understanding of the financial issues and challenges faced by expatriates. Patient, clear-headed, and articulate, she welcomes her clients' questions and seeks to work in partnership with them to make the most of their financial resources.

Peggy began her career in finance in 1994 as an equity analyst and later as head of research serving institutional clients and fund managers at multinational firms such as Citigroup, Salomon Smith Barney, and Paribas Asia Equity. Her financial analysis skills helped her earn rated analyst rankings in the annual AsiaMoney and Institutional Investor surveys and were instrumental in helping the Citigroup Thailand team earn recognition from AQ Research as having the best equity research in terms of accuracy of recommendations. She now uses those skills to advise her private clients in how they can make the most of their global financial resources.

Prior to entering the finance profession, Peggy served as a Military Intelligence Officer with the U.S. Army. She graduated Phi Kappa Phi from the United States Military Academy at West Point where she studied Economics (Mathematical) and Engineering, receiving a Bachelor of Science degree in 1988. She joined her husband in Thailand in 1993 in pursuing an overseas career and life. After three years of graduate-level finance work, she was awarded the Chartered Financial Analyst (CFA) designation in 1996. In addition, Peggy has been certified by the Certified Financial Planner Board of Standards, Inc. to advise on U.S.-related financial planning matters.

Peggy currently serves as a co-chairman of the American Chamber of Commerce in Thailand's Business and Economics Committee. She enjoys skiing, motorcycling, and salsa dancing. She is also a recovering long distance runner.

Education

- Phi Kappa Phi Graduate, United States Military Academy, West Point – 1988

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