CRECELING & CREVELING
Private Wealth Advisory

Helping Expatriates Make Smart Financial Decisions

Peggy Creveling, CFA

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Peggy relocated to Bangkok, Thailand, to work in international institutional equity research with her husband, Chad, in 1993. Now, having lived abroad for more than two decades, she has a personal understanding of the unique opportunities and challenges that expats face when managing their finances. That background, combined with her years of experience in the financial industry (which includes roles at Citigroup, Salomon Smith Barney, and Paribas Asia Equity), gives her a unique perspective on expat financial issues.

Today, Peggy puts her diverse experience to work as Creveling & Creveling Private Wealth Advisory's Executive Director. In this role, she provides integrated financial planning and investment advisory services to expatriates and their families throughout Thailand and Southeast Asia. Patient, clear-headed, and articulate, she welcomes her clients' questions and works in partnership with them to make the most of their financial resources. Over the years, Peggy has built a reputation as a recognized expert on expat issues, regularly sharing her knowledge with *The Wall Street Journal*, *South China Morning Post*, and other publications. Because of their deep knowledge of expat financial issues, Peggy and her husband were invited by *The Wall Street Journal* to be part of a panel of experts providing personal finance advice on its WSJ Expat site.

Before Peggy and Chad founded their independent advisory firm, she worked as an equity analyst and head of research serving institutional clients and fund managers. 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 in 1988. Following 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. For eight years, she served as a co-chair of the American Chamber of Commerce in Thailand's Business and Economics Committee.

In her free time, Peggy 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

Certifications and Designations

- Chartered Financial Analyst® (CFA®)—1996
- Certified Financial Planner™ (CFP®) professional to advise on U.S. financial planning matters—2012

Memberships and Affiliations

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

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