

ClairFi Technologies Appoints Veteran CPA Lisa Sretenovic as Managing Director to Lead CPA Firm Partnerships

Leading Strategic Alliances & Ecosystem Education to Help Accounting Firms Deliver Private Investment Access and Coordinated Wealth Strategy to Their Clients

FRISCO, TX, UNITED STATES, June 19, 2026 /EINPresswire.com/ -- [ClairFi](#)

Technologies, the company defining a new category in private wealth management and private investment distribution today announced the appointment of Lisa Sretenovic, CPA/CITP/CGMA/CAAS, as Managing Director, Strategic Alliances & Ecosystem Education for [ClairAlpha](#), the company's B2B partner enablement platform and advisory services.



“

Lisa joined ClairFi because we want CPA firms to see that this model is already working — in the hands of someone who built her career exactly the way they built theirs.”

Sreenivasa Seelam, Founder & CEO, ClairFi Technologies

The appointment marks a strategic expansion of [ClairFi's CPA partnership program](#), bringing a seasoned accounting professional into a dedicated role designed to help CPA and advisory firms offer private investment access, tax-coordinated strategy, and institutional-grade wealth infrastructure to their high-income clients — without adding headcount, compliance burden, or cost to the firm.

Ms. Sretenovic brings more than 30 years of experience as a controller, CFO, and public accounting partner across

industries including real estate investment, SaaS, telecommunications, manufacturing, hospitality, and oil & gas. As founder of a specialized coaching practice focused on helping CPA firms deepen client relationships through high-touch advisory services, she has spent her career addressing the same structural challenge ClairAlpha is built to solve: how accounting firms move beyond compliance delivery to become the most trusted, comprehensive adviser in their clients' financial lives.

ClairAlpha is the industry's first purpose-built partner distribution infrastructure for tax-coordinated private investments — giving CPA firms, RIAs, and investment sponsors a turn-key, compliance-ready infrastructure to connect high-income clients and accredited investors to institutional-quality private placements, with every investment evaluated against the client's specific tax position

In her role as Partner Adviser, Ms. Sretenovic will work directly with CPA and accounting firms to introduce ClairAlpha as a turn-key platform extension — one that enables firms to respond when high-income clients ask about private placements, tax-advantaged investments, and coordinated wealth strategy. ClairAlpha provides access to vetted 506(b)/(c) private placements, AI-powered tax mapping through ClairAI, and subscription workflow automation, all backed by the compliance infrastructure of ClairAlpha Advisors LLC, a registered investment adviser operating under a fiduciary standard. Participating firms receive revenue-share economics for each referred client, with zero cost to enroll.

ClairFi's B2B positioning reflects a deliberate philosophy: the platform is designed to make partner firms more powerful for their clients by provide value-add products and services — not to compete with or replace the relationships those firms have already built. Ms. Sretenovic's background on both sides of the CPA-client relationship makes her a natural voice for that message within the accounting community.

"High-income clients are asking their CPA one question more than any other: what should I do with this money? For too long, the answer has been a referral to someone else — and the relationship quietly fragments from there. ClairAlpha closes that gap without adding a single hour of liability to the firm. Lisa Sretenovic spent three decades earning the trust that makes that conversation possible. Lisa joined ClairFi because we want CPA firms to see that this model is already working — in the hands of someone who built her career exactly the way they built theirs."

— Sreenivasa Seelam, Founder & CEO, ClairFi Technologies

"CPA firms do not have a client relationship problem. They have a scope problem. The trust is already there. The access to the right financial decisions is not. ClairAlpha does not disrupt that relationship — it extends it, on the firm's terms, with zero cost and a compliance framework CPAs can stand behind. I joined ClairFi because I have seen what happens to client relationships when a firm can finally answer the questions they were never equipped to answer before. The ones that stay do not just stay — they grow."

— Lisa Sretenovic, Managing Director, Strategic Alliances & Ecosystem Education, ClairFi Technologies

Ms. Sretenovic is a member of the American Institute of Certified Public Accountants and the Texas Society of Certified Public Accountants, where she serves on the Financial Literacy Committee. She has served as a board member of Texas Accountants and Lawyers for the Arts and as a volunteer with SCORE. A sought-after speaker, she has presented at the City of Austin

Small Business Expo, UT Austin, Baylor University, Austin Community College, and the International Financial Coach Conference, among other forums. She is based in Austin, Texas.

CPA firms interested in exploring a ClairAlpha partnership are invited to schedule a discovery conversation at <https://clairfi.com/partner-discovery-call>.

About ClairAlpha

ClairAlpha is the B2B partner enablement platform of ClairFi Technologies. It connects CPA firms, RIA firms, and broker-dealers to a pre-qualified, tax-motivated accredited investor base through a turn-key platform that includes vetted 506(b)/(c) private placements, AI-powered tax savings optimization, workflow automation via ClairFlow, and compliance infrastructure through ClairAlpha Advisors LLC (SEC-registered RIA). ClairAlpha is offered at zero cost to partner firms, with revenue-share economics tied to client outcomes. For more information visit <https://clairAlpha.com>

About ClairFi Technologies

ClairFi Technologies is the Private Wealth Office platform for high-income professionals with \$1M–\$15M in net worth. Headquartered at The Star in Frisco, Texas, ClairFi offers Alpha Endowment model to its clients and coordinates tax strategy, investment management, and financial planning through a single, AI-powered system. For more information, visit <https://clairfi.com>

Public Relations

Clairfi Technologies

+1 713-364-3839

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