




Cheryl A. Morena

Client Services Manager

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SPECIALTIES

Client Service Management

Financial Planning

Compliance Planning

PROFESSIONAL PROFILE

Cheri is the quarterback of both the Claris team and the Morena family team. As the Client Services Manager for Claris, Cheri handles the operational responsibilities, managing the team's tasks to stay proactive for Claris clients. While she leaves the "understanding and investing" aspects to Stan, Scott and Chris, Cheri is ready and willing to help clients relax, knowing their investments are being managed with the highest degree of care and commitment. Cheri optimizes workflows and processes to help keep the team running effectively and efficiently. She is also responsible for the team's compliance program, Claris events and preparing company financials.

