

Cathy Pereira, CFP®, CDFA®

Biography



Name

Cathy Pereira, CFP®, CDFA®
Senior Financial Consultant

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Cathy Pereira is a Senior Financial Consultant at Manning & Napier. In this capacity, she is responsible for coordinating all aspects of client relationships with Manning & Napier, including both investment specific discussions and comprehensive financial planning topics, in the Greater Rochester New York area.

Cathy re-joined the firm in 2021 after previously working for the firm in an investment research role in the mid to late 90s. She has ten years of experience in the financial services industry.

Cathy is involved in a number of organizations in town and is on the Parish Council for St. Louis Church.

Cathy earned a BS from SUNY Geneseo. She is a CERTIFIED FINANCIAL PLANNER™ professional, holds her Certified Divorce Financial Analyst® designation, holds Series 6, 7 and 63 licenses, and is a member of the Estate Planning Council of Rochester.