

HARTLAND



independence
expertise
results

Peggy E. Shalala | Client Service Associate

INDEPENDENCE | Community Commitments & Personal Interests

Peggy resides in Chesterland with her husband and their two rescue dogs. She enjoys her traveling to visit her two grown children, reading, walking, playing and training her dogs. Also, Peggy and her two dogs, who are now certified therapy dogs, make monthly visits to area nursing homes. She enjoys doing various home improvement projects. Peggy is also active in her church.

EXPERTISE | Career Accomplishments & Education

Peggy has over eighteen years in the field of banking and finance. She spend six years as a tax processor at local CPA firms and an additional ten years in various administrative roles for a major bank and a large finance company. Peggy has attended Cleveland State University.

RESULTS | Responsibilities at Hartland

Peggy supports Greg Althans, one of the Senior Managing Directors in the Private Client Group at Hartland. Her work entails delivering each of the four broad services for her assigned clients, generating reports, reconciling accounts, establishing new relationships, and other tasks involved with serving wealth management clients. She is also responsible for account maintenance, investment statement production, scheduling meetings, and other special projects.



CONTACT PEGGY E. SHALALA

To contact Peggy, call us at 216-621-1090, email her [HERE](#) or use our [contact request form](#)