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Modera Wealth Management Expands New York Presence

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Albany-based Aaron Lieberman joins Modera as a wealth manager and principal, strengthening the firm's presence in New York's Capital Region

WESTWOOD, N.J., [August 4], 2026 — Modera Wealth Management, LLC ("Modera"), a fee-only wealth management firm serving individuals, families, business owners, and nonprofit organizations, today announced that Aaron Lieberman, founder of Marathon Wealth Management of Albany, New York, has joined the firm. Lieberman brings approximately $155 million in assets under management to Modera and expands the firm's presence in New York's Capital Region.

Lieberman built his practice around a simple idea: helping clients make sense of their financial lives and feel more confident about the decisions in front of them. As a wealth manager and principal with Modera, he will continue advising clients, building relationships across the Capital Region and Long Island, and mentoring young advisors. "Aaron's success springs from a commitment to caring for his clients and the belief that financial advice should make life simpler, not more complicated," said Tom Orecchio, CEO of Modera. "As we got to know Aaron and his team, we saw how closely our values align. We share a commitment to putting clients first, acting as fiduciaries, and building long-term relationships. We're very pleased to welcome Aaron, his team, and their clients to Modera."

Joining Modera allows Lieberman to continue serving clients while planning for the next stage of his career and creating new professional opportunities for his team. The move also gives clients continued support from the people they know, along with access to a broader team and more resources. Lieberman, a CERTIFIED FINANCIAL PLANNER® professional and Certified Divorce Financial Analyst, works with clients who are approaching retirement but do not see this stage of life as an ending. Instead, many are thinking about how to align their time, resources, and priorities around what comes next.

"Many of the people I work with are not looking to simply wind down," Lieberman said. "They want to think carefully about what this next chapter should look like and how to align their finances with that vision. I've always cared deeply about helping clients approach that realignment with clarity and confidence. Joining Modera gives me an even stronger platform to do that."

About Modera Wealth Management

Modera Wealth Management provides comprehensive wealth advisory, financial planning, investment management, and tax services to individuals, families, nonprofit institutions, and retirement plan sponsors. The firm serves more than 6,300 clients across the country and oversees $17.5 billion in assets under management as of Dec. 31, 2025. With a strong client-first culture since its inception in 1983, Modera is majority owned by employee shareholders and committed to making a positive and lasting impact on its clients, employees, and in communities. Visit ModeraWealth.com to learn more.

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