

David J. Calvert, CFA

Director

PFM Asset Management LLC

David Calvert joined PFM Asset Management in 2000 and manages client relationships for PFMAM's East region. As a client manager, David is responsible for structuring prudent investment programs consistent with his clients' goals and objectives. This entails developing investment policies, modeling and forecasting cashflows, identifying investment strategies, and coordinating with PFMAM's portfolio management and back-office teams.

David's clients range from municipal governments, transportation authorities, state treasurers and higher education institutions. Investment mandates range from bond proceeds, short- to intermediate-term fixed income separately managed accounts (SMAs) and multi-asset class (MACM) investment strategies.

He has been a guest speaker at multiple conferences and training sessions for the Virginia Government Finance Officers' Association, Treasurers' Association of Virginia, North Carolina Local Government Investment Association, Southern Association of College and University Business Officers, Texas Association of Counties, and the Texas Association of Community College Business Officers.



Contact

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Specialties

State & Local Governments,
Higher Education

Education

B.S. in Business
Administration
with a concentration in Finance
and Accounting
Bloomsburg University

M.S. in Finance
Boston College

Professional Designations or Licenses

Chartered Financial Analyst
(CFA)

FINRA Series 6, and 63
Licenses

Started with PFM: 2000

Started in the Field: 2000