

David Reeser, CFA, CTP, EA

Managing Director

PFM Asset Management LLC

David Reeser joined PFAM in 1996 and currently serves as the Head of Client Experience. In this role, Dave provides strategic and executional oversight to the Sales Enablement, Client Services, and Reporting Teams. These three teams focus on delivering and supporting PFAM's high touch service approach, client retention, and growth objectives. In addition, Dave is responsible for regulatory supervision of registered representatives, risk management, and oversight of PFAM's fixed-rate, fixed-term product.

Dave led the development and launch of PFAM's Environmental, Social and Governance (ESG) investment solution for fixed income portfolios. In this capacity, Dave oversaw ESG data management and data integrity, ESG client reporting, and the creation and execution of sustainable investment solutions. He has also worked with public sector and non-profit organizations to develop or update investment policies/indentures, evaluate cash flow requirements, and to design and implement customized investment strategies for capital and operating funds.

Dave previously managed and was responsible for PFAM's Arbitrage Rebate and Tax Compliance practice. Dave led business development and client management efforts, provided internal and external training, established, and monitored quality control standards, and developed the methodology and approach utilized by the team. He also identified and employed solutions to reduce client liabilities and assisted organizations with responding to IRS audits. Dave was also previously responsible for organizing and leading the training provided to PFAM analysts.

Dave is a CFA Charterholder, Certified Treasury Professional



Contact

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Specialties

Cash and Enhanced Cash ,
Sustainable Investing

State & Local Governments

Education

B.A. in Economics
Swarthmore College

MBA

Pennsylvania State University

Professional Designations or Licenses

Chartered Financial Analyst
(CFA)

Certified Treasury Professional
(CTP)

IRS Enrolled Agent (EA)

FINRA Series 6 and 63
Licenses

Started with PFM: 1996

Started in the Field: 1995



(CTP) and an Enrolled Agent (EA). Dave also holds the Financial Industry Regulatory Authority (FINRA) Series 6, 26, and 63 licenses.