

David Walters, CFA, CAIA, CTP

Client Manager

PFM Asset Management LLC

David returned to PFM Asset Management in 2023 after working for the firm for more than 13 years earlier in his career. He specializes in arbitrage compliance and investment strategies for tax-exempt bond proceeds. David has experience working with a range of tax-exempt issuers including, municipalities, educational institutions, transportation authorities, healthcare systems, states and numerous others. He has advised issuers on complex compliance issues related to variable rate debt, commercial paper programs, transferred proceeds, universal cap allocation, liability forecasts, and more.

Prior to rejoining PFMAM, David worked as a senior investment analyst for the City of Milwaukee and as the director of treasury management consulting for PFM. He enjoys speaking at conferences and other industry association events across the country.



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Specialties

Arbitrage Rebate

Education

B.S. in Finance
Pennsylvania State University

Professional Designations or Licenses

Chartered Financial Analyst
(CFA)

Chartered Alternative
Investment Analyst (CAIA)

Certified Treasury Professional
(CTP)

Started with PFM: 2023

Started in the Field: 2007