

Floyd Simpson III, CFA, CAIA, CFP

Director

PFM Asset Management LLC

Floyd joined PFAM in 2019 and is a director in our OCIO business. He is a strategist within our OCIO Portfolio Strategies Group, which has daily oversight of all of our OCIO strategies. In this role, he provides analysis on the economic landscape and capital markets. Floyd also creates market commentary and thought leadership pieces for clients and presents at conferences and educational seminars. He serves on the Investment Committee and the Manager Review subcommittee.

Prior to joining the firm, Floyd worked as an investment officer where he was the associate portfolio manager for the Global and International Equity strategies. His duties included quarterly commentary on the developed markets and investment managers in his purview, monitoring the Global and Developed International Equity strategies, executing due diligence on managers across the G20 and Emerging Market regions, along with contributing intellectual content for ad hoc white papers. His experience includes working with retail and institutional clients to provide analysis and investment solutions.

Floyd serves on the Board of Trustees for A.T. Still University, Boys' Latin of Philadelphia, and is an Executive Board Member of the CFA Society of Philadelphia. He is a former Investment Committee member for the Truman State University Foundation Board.



Contact

1735 Market Street
43rd Floor
Philadelphia, PA 19103

simpsonf@pfmam.com
215.557.1435 office

Specialties

State & Local Governments,
Endowments, Foundations &
Charitable Institutions

Education

BBA in Finance
Truman State University

MBA in Business
Administration
DePaul University

School of Continuing Studies
Financial Planning
Northwestern University

Professional Designations or Licenses

Chartered Financial Analyst

Chartered Alternative
Investment Analyst

Certified Financial Planner

FINRA Series 6 and 63
Licenses

Started with PFM: 2019



RESUMES OF KEY PROFESSIONALS

Started in the Field: 2002