

Mallory Sampson, CFP

Director

PFM Asset Management LLC

Mallory is a director for PFM Asset Management's investment advisory team. She is responsible for managing the firm's institutional multi-asset class relationships in Texas with a focus on higher education, endowments, foundations and OPEB trusts.

Previously, Mallory worked for Vanguard's institutional non-profit business, helping large private endowments and foundations reach their short and long term investment requirements.



Contact

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Specialties

Outsourced Chief Investment Officer (OCIO)

Primary & Secondary Education, Higher Education, Endowments, Foundations & Charitable Institutions

Education

B.S. in Economics
Boston University

B.S. in International Relations
Boston University

Professional Designations or Licenses

FINRA Series 7 and 63

Certified Financial Planner (CFP)

Started with PFM: 2019

Started in the Field: 2011