

Nancy Jones

Managing Director

PFM Asset Management LLC

Nancy joined PFM Asset Management in 1989 as a managing director in our San Francisco office. She is responsible for investment advisory services for selected accounts in the West region.

Nancy is the client liaison for all municipal investment portfolios in the Western region. She has conducted numerous workshops and seminars for clients' staff and board members on such subjects as permitted investments, developing investment policies and internal controls and oversight to seek safety of principal invested. She is invited frequently to make presentations to annual conferences.

Before joining the firm, Nancy worked as vice president in the Trading and Investment Group of Wells Fargo Bank. For 10 years before joining Wells Fargo, she worked for Crocker National Bank, most recently as vice president in the Capital Markets Division. Before that, she managed the commercial banking unit responsible for the development of new liability products and services for institutional customers.

She is a member of the California Association of County Treasurers and Tax Collectors, the California Municipal Treasurers Association, the California Society of Municipal Finance Officers and the California Association of Joint Powers Authorities.



Contact

1 California Street
Suite 1000
San Francisco, CA 94111

jonesn@pfmam.com

Education

B.B.A.
University of California
Berkeley

Started with PFM: 1989

Started in the Field: 1977