

Philip Levy, CFA, CPA

Portfolio Manager

PFM Asset Management LLC

Philip joined PFAM as a portfolio manager in 2024 and is based in San Francisco. He is responsible for managing taxable short- and intermediate-term multi-sector fixed income strategies for separate accounts and blended portfolios.

Prior to joining PFAM, Philip was a director and fixed income portfolio manager at HighMark Capital Management. He began his career in 1991 at KPMG Peat Marwick before moving to American Century Investments as a credit research analyst. He holds the Chartered Financial Analyst (CFA) designation and is licensed as a Certified Public Accountant (CPA).



Contact

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Specialties

Short & Intermediate Term
Fixed Income , Cash and
Enhanced Cash

Taft-Hartley, State & Local
Governments, Endowments,
Foundations & Charitable
Institutions

Education

B.A. in Business Economics
University of California, Santa
Barbara

Professional Designations or Licenses

Chartered Financial Analyst
(CFA)

Certified Public Accountant
(CPA)

Started with PFM: 2024

Started in the Field: 1991