

Rina Patel

Senior Analyst

PFM Asset Management LLC

Rina joined PFM Asset Management LLC after graduating from Penn State with a B.S. in Accounting. As a senior analyst within the Arbitrage and Tax Compliance Group, Rina analyzes various account data related to Municipal Bond issues to determine which transactions are subject to the arbitrage rebate regulations. Rina performs arbitrage rebate calculations, yield restriction compliance analysis, spending exception analysis, cash flow analysis, transferred proceeds calculations, commingled funds analysis and other arbitrage-related services. She also provides support for the arbitrage rebate compliance provided for clients within the Pennsylvania Local Government Investment Trust (PLGIT) and New Jersey Asset & Rebate Management Program (NJ/ARM).



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Education

B.S. in Accounting
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Started with PFM: 2017

Started in the Field: 2017