

Sarah Hart, CFA

Senior Managing Consultant
PFM Asset Management LLC

Sarah Hart joined PFM Asset Management in 2016 and is currently a senior managing consultant. Sarah is a member of the firm's Outsourced Chief Investment Officer (OCIO) practice, serving as an OCIO specialist. She works with clients across the country, concentrating on pensions, OPEB trusts, endowments and foundations, and other long-term institutional assets.

Sarah began her career and spent seven years with the Arbitrage & Tax Compliance Group. She provided comprehensive arbitrage rebate compliance services to tax-exempt issuers on a nation-wide basis. Those services included arbitrage rebate calculations, yield restriction compliance analyses, post-issuance compliance consulting, and serving as a verification agent for refunding bonds and escrows. Sarah has experience working with various issuers including municipalities, educational institutions, transportation authorities, healthcare systems, states, utility providers, and numerous others. She has provided analysis on fixed rate and variable rate debt, commercial paper programs, arbitrage rebate liability optimization strategies, liability forecasts, and more.

Sarah graduated summa cum laude with a Bachelor of Science in Economics and Political Science from the Honors Program at Shippensburg University. At Shippensburg University, she was a member of the NCAA Division II Cross Country and Track and Field teams and was President of the Honors Student Organization. Sarah currently serves on The Wood Honors College Advisory Council at Shippensburg University.



Contact

213 Market Street
Harrisburg, PA 17101

latchs@pfmam.com
717.231.6237 office
717.439.9129 cell

Specialties

Arbitrage Rebate , Outsourced
Chief Investment Officer
(OCIO)

State & Local Governments,
Pensions & Other Post-
Employment Benefits (OPEB),
Endowments, Foundations &
Charitable Institutions

Education

B.S. in Economics and
Political Science
Honors Program
Shippensburg University

Professional Designations or Licenses

Chartered Financial Analyst®
(CFA)

FINRA Series 6 and 63
Licenses

Started with PFM: 2016

Started in the Field: 2016