



Brian Carter

Managing Director

PFM Financial Advisors LLC

Brian returned to PFM in 2018. He primarily serves PFM's acute care healthcare clients as a financial advisor offering advice on corporate strategy, capital structure, and execution in the capital markets. Other clients include non-profits, continuing care retirement communities, and other human service providers.

Brian began his career at PFM in 1999 where he worked with healthcare clients for six years. His most recent previous experience includes over thirteen years in public finance healthcare investment banking at Wells Fargo Securities where he served institutions including NYUHC, UPMC, Geisinger, Hackensack Meridian and Princeton Health System in negotiated bond sales and mergers and acquisitions.

Additionally, he worked with clients in public power including MMWEC, OUC, Energy Northwest and MEAG Power as a financial advisor.



Contact

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Specialties

Higher Education, Charitable Institutions, Healthcare

Financial Advisory

Education

B.S. in Business
Administration and Finance
LaSalle University

Professional Designations or Licenses

Municipal Advisor
Representative (Series 50)

Started with PFM: 2018

Started in the Field: 1999