



## Beth Smith

Senior Managing Consultant  
PFM Asset Management LLC

Beth Smith returned to PFM in January 2016, after a leave of absence, to join the Payment Solutions team in the Long Island, NY office. Her primary responsibility is to support the existing client base in strengthening their P-Card utilization and maximizing the efficiencies within their program. She also executes training webinars for new and existing clients, assists in the on-going efforts to enhance customer communication, provides support to our clients' program administrators, and works directly with BMO's team to ensure a high level of customer service and satisfaction.

Prior to joining the P-Card team, she worked for PFM's investment advisory team for three years, coordinating the transition of the Long Island, New York banking and customer service operations to PFM's asset management headquarters in Harrisburg, Pennsylvania after PFM acquired the company she worked for in 2004 - Cadre Consulting Services, Inc.

Beth worked for Cadre Consulting Services, Inc. for 20 years. During the last 14 years of her tenure she was responsible for overseeing the day to day operations of programs totaling \$6 billion in assets. Her responsibilities encompassed banking relations, client services, account information, client reporting and account reconciliation at the client, program and banking levels.



---

### Contact

4250 Veterans Memorial  
Highway  
Suite 3150 West  
Holbrook, NY 11741

smithb@pfm.com  
631.542.5315 office

### Specialties

Asset Management,  
Specialized Services

State & Local Governments, K-  
12 Schools

### Education

MBA  
Villanova University