



David J. Calvert, CFA

Director

PFM Asset Management LLC

David Calvert is a director specializing in providing investment advisory and treasury consulting services.

David provides a broad range of investment advisory and consulting services for clients located primarily in the East and the South. These services include developing portfolio strategies, modeling cash flows, reviewing portfolio performance, and updating investment policies.

As a member of PFM's treasury consulting practice, David helps clients identify their banking needs and assists in the time-consuming process of competitively procuring banking services. These engagements typically result in his clients receiving significant cost savings, new and improved services, and greater customer service from their banking partner.

He has worked on treasury consulting projects with clients across the country in 28 different states. He has been a guest speaker at multiple conferences and training sessions for the Virginia Government Finance Officers' Association ("VGFOA"), Treasurers' Association of Virginia, North Carolina Local Government Investment Association, Southern Association of College and University Business Officers ("SACUBO"), Texas Association of Counties, Texas Association of Community College Business Officers, and the Western Association of College and University Business Officers ("WACUBO").



Contact

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Specialties

Asset Management,
Specialized Services

State & Local Governments,
Higher Education

Education

B.S. in Business
Administration
with a concentration in Finance
and Accounting
Bloomsburg University

M.S. in Finance
Boston College

Professional Designations or Licenses

Chartered Financial Analyst
(CFA)

FINRA Series 6, and 63
Licenses

Started with PFM: 2000

Started in the Field: 2000