



Daniel H. Kozloff

Managing Director

PFM Financial Advisors LLC

Dan is a managing director in PFM's Philadelphia office and manager of the Quantitative Strategies Group, providing primary technical, new product, transactional and modeling solutions for clients and developing proprietary analytical tools used throughout PFM's various business practices. Dan also oversees PFM's training programs, including comprehensive sessions for new hires, current employees, lateral hires, and clients. Dan manages PFM's Municipal Advisory Research Group, leads PFM's Tobacco Securitization Group and is a co-leader of PFM's Center for Retirement Finance.

Additionally, Dan co-leads PFM's municipal investor relations platform. Munite[®] is a one-stop shop investor relations platform that bridges the gap between the municipal issuer and investor communities, helping to ensure that issuers are optimizing their investor relations outreach when accessing the capital markets to secure funding for critical public projects.

Dan has provided primary transactional support on various complex issuances for the Commonwealth of Pennsylvania (the Commonwealth); the States of Michigan, Ohio, New York, New Jersey, Washington, Iowa, Nevada as well as New York City, Philadelphia and Sacramento County. He was involved in the comprehensive restructuring of the Commonwealth's Public Education Funding System and state-wide tax reform to supplement the Commonwealth's Education Funding. Dan has advised the Commonwealth on over \$27 billion of debt issuance since 2003.

Dan serves as financial advisor to Philadelphia-area governments and institutions, including Montgomery County, Radnor Township,



Contact

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Specialties

Financial Advisory, Specialized Services

State & Local Governments,
Higher Education

Education

B.A. in Political Science
University of Pennsylvania

Professional Designations or Licenses

Municipal Advisor
Representative (Series 50)

Municipal Advisor Principal
(Series 54)

Started with PFM: 1999

Started in the Field: 1999



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RESUMES OF KEY PROFESSIONALS

Girard Estate and College, Moore College of Art & Design, the Public Health Management Corporation, as well as Centre County and Pennsylvania State University.