



Daniel Lupia

Senior Analyst

PFM Asset Management LLC

Daniel Lupia is a senior analyst in PFM's Harrisburg office. He started at PFM in July 2016 and spent three years in the company's rotational program, specializing in all aspects of asset management for fixed income portfolios before joining the treasury consulting practice. More recently in the Treasury Consulting Group, he is responsible for analyzing bank services and fees, as well as conduct banking industry research. Daniel is also involved with drafting RFPs for banking services and evaluating proposal responses on behalf of our clients. Additionally, he still supports clients with all facets of their investment programs, including cash management, investment policy development, portfolio structures, investment performance analysis, and economic research and reporting.

Daniel graduated from Lafayette College with a Bachelor of Arts degree in Economics and International Affairs. He holds the CFA Investment Foundations Certificate, the Bloomberg Market Concepts Certificate, as well as Financial Industry Regulatory Authority (FINRA) Series 6 and 63 licenses.



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Specialties

Specialized Services, Asset Management

Education

B.A. in Economics and
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Lafayette College

Professional Designations or Licenses

FINRA 6 and 63 Licenses

Started with PFM: 2016

Started in the Field: 2016