



## David Reeser, CTP, EA

Managing Director

PFM Asset Management LLC

Dave Reeser leads PFM's fixed income ESG investment service. In this role, Dave works with public sector and non-profit clients to design and implement customized fixed income ESG investment programs. He also spearheads ESG business development, education, and service enhancement efforts, and oversees ESG reporting, and other ESG related initiatives.

Dave is also a co-leader of PFM's investment advisory team in the Northeastern U.S. He is responsible for developing and managing investment programs for public sector and non-profit clients. Dave provides organizations with a broad range services designed to enhance their investment programs, including updating their investment policies and indentures, evaluating cash flow requirements, and developing and implementing customized investment strategies.

In addition, Dave developed and built PFM's Arbitrage Rebate Compliance practice. In this capacity, Dave led business development and client management efforts, provided training and quality control, and developed the methodology and approach utilized by the team. He also identified and employed solutions to reduce liabilities and assisted organizations with responding to IRS audits.

Dave was previously responsible for organizing and leading the training provided to PFM's asset management analysts.

Dave holds the Financial Industry Regulatory Authority (FINRA) Series 6 and 63 licenses, and he is a Certified Treasury Professional (CTP). Dave is also an Enrolled Agent (EA) and a candidate in the CFA Program.



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### Contact

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### Specialties

Asset Management,  
Specialized Services

State & Local Governments,  
Charitable Institutions

### Education

B.A. in Economics  
Swarthmore College

MBA

Pennsylvania State University

### Professional Designations or Licenses

Certified Treasury Professional  
(CTP)

IRS Enrolled Agent (EA)

FINRA Series 6 and 63  
Licenses

**Started with PFM:** 1996

**Started in the Field:** 1995

