



David Reeser, CTP, EA

Managing Director

PFM Asset Management LLC

David Reeser joined PFM in 1996. Dave is a co-leader of PFM's investment advisory practice in the Northeastern U.S. He is also responsible for developing and managing investment programs for public sector and non-profit clients. Dave assists organizations with updating their investment policies and indentures, evaluating cash flow requirements, and designing and implementing customized investment strategies for cash reserves, bond proceeds, indentured funds, and trust funds.

Dave also serves as the director of the PFM Arbitrage and Tax Compliance Group. In this capacity, Dave has led business development and client management efforts, provided training and quality control, and developed the methodology and approach utilized by the Group. He has also identified and implemented solutions to reduce liabilities and assisted organizations with responding to IRS audits.

Dave was also previously responsible for organizing and leading the training provided to analysts hired to work in PFM's asset management business.

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).



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