



James Carbone

Senior Managing Consultant
PFM Financial Advisors LLC

Jim Carbone joined PFM as a senior managing consultant in its Los Angeles office in May 2016. He provides financial advisory services to a wide range of municipal clients, particularly in the area of public utilities. In addition he manages the Western region analyst group, which provides analytical and consulting support to the Firm's project managers throughout the western United States.

Prior to joining PFM, he worked for over 22 years as an investment banker for Wall Street firms including Bear, Stearns & Co. and First Boston. His 30 years of work experience includes the development of complex financing and cash flow models in the areas of public finance and real estate finance. He is highly skilled in the use of both DBC (the public finance industry standard bond sizing software) and Microsoft Excel. In the area of public finance he has structured lease revenue bonds, certificates of participation, general obligation bonds, revenue bonds, variable rate demand bonds and auction rate securities.

In addition, he has managed financings which incorporated a variety of derivative products including fixed payer swaps, constant maturity swaps, cancellation option swaps, basis swaps, and indexed floater cost of fund swaps.



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Specialties

State & Local Governments,
Public Power

Financial Advisory

Education

B.A. in Mathematics and
Economics
University of California, Los
Angeles

MBA

University of California, Los
Angeles
Anderson School

Professional Designations or Licenses

Municipal Advisor
Representative (Series 50)

Started with PFM: 2016