



## Jonathan Sundberg

Client Relations Manager  
Munite LLC

Jonathan Sundberg is the client relations manager on PFM's Munite team. Jonathan is responsible for supporting the full life cycle of user interactions with the Munite platform. This includes conducting internal and external demonstrations, monitoring the onboarding process, developing and implementing upgrades, and monitoring the on-going support needs of all Munite users.

Prior to joining the Munite team Jonathan was a member of PFM's Financial Institutions Group, where he helped depositories optimize their investment portfolios. Jonathan is co-creator of PFM's Community Bank Investment Index (PFM CBI Index), a first of its kind tool that allows investors, regulators and market participants to easily assess the risk and return profiles of the 5,000+ institutions within the community banking industry.

Jonathan joined PFM in 2015 and works in the Philadelphia office. Prior to joining PFM, Jonathan served as Vice President Institutional Sales at Janney Montgomery Scott with a focus on servicing institutional investors. In this role, Jonathan developed targeted trading strategies to meet clients' performance goals.



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### Contact

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### Specialties

Specialized Services, Asset Management

### Education

B.S. in Finance and Legal Studies in Business  
Tulane University  
A.B. Freeman School of Business