



Khalid Yasin, CIMA, CHP

Director

PFM Asset Management LLC

Khalid Yasin is a director leading business development and client relationship management for PFM's discretionary outsourced chief investment officer (OCIO) fiduciary solutions in the Southeast region. Additionally, Khalid leads PFM's endowment and foundation national practice. He joined PFM in 2012, and works with higher education and healthcare institutions, endowments, foundations, as well as public pension and OPEB funds.

Prior to joining PFM, Khalid spent fifteen years at Bank of America, most recently as vice president and portfolio manager managing \$2 billion in assets for private, endowment and retirement clients, in addition to a high-profile sovereign wealth fund. He also served on the bank's Investment Strategies Committee with a stint as a buy-side equity analyst. Prior to his investment management roles, he led internal projects that resulted in over \$150 million in annual profit growth, as well as helping launch the bank's multi-family office (MFO) business segment.

Khalid holds the Certified Investment Management Analyst (CIMA) and Certified Hedge Fund Professional (CHP) designations, and is a Certified Lean Six Sigma Black Belt. In the community, he serves on the Space Coast Health Foundation Board of Directors among other nonprofit and volunteer work.



Contact

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Specialties

Asset Management

Higher Education, Healthcare,
Endowments & Foundations

Education

B.A. in International Political
Economy
University of California at
Berkeley

Professional Designations or Licenses

FINRA Series 6 and 63
Licenses

Certified Investment
Management Analyst (CIMA)

Certified Hedge Fund
Professional (CHP)

Started with PFM: 2012

Started in the Field: 1995