



Kathleen Zhang

Senior Analyst

PFM Financial Advisors LLC

Kathleen Zhang is a senior analyst with PFM Financial Advisors, specifically supporting PFM's Higher Education and Healthcare practices in Boston, MA. Her job responsibilities include structuring, sizing, and pricing municipal bond issues; assessing municipal issuers' outstanding debt, debt capacity, and credit; ongoing monitoring of refinancing opportunities; and other financial advisory services analysis. She also supports the Higher Education practice in developing proposals and marketing collateral for prospective clients. Kathleen has experience working with both public and private colleges and universities, independent schools, and non-profit health care providers.

Prior to joining the Higher Education and Healthcare practices, Kathleen worked in PFM's East Financial Advisory Pool, where she assisted clients in the local and state government sectors.



Contact

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Specialties

Financial Advisory

Higher Education, Healthcare

Education

B.A. in Philosophy, Politics and
Economics
University of Pennsylvania

Professional Designations or Licenses

Municipal Advisor
Representative (Series 50)

Started with PFM: 2018

Started in the Field: 2018