



Matthew Smith, CFA

Senior Analyst

PFM Asset Management LLC

Matt Smith is a senior analyst on PFM's Multi-Asset Class Management team. In this role, Matt splits his time between the group's business development and client service needs. He works in concert with the team's investment consultants to respond to RFPs, prepare new business presentations, and present client performance alongside PFM's market outlook. Matt supports a variety of client types including endowments, foundations, pension funds, OPEB trusts, and other non-profit entities. In addition, Matt attends industry conferences and conducts regular outreach to further the group's business development efforts.

Matt began his career at PFM in 2018 as an analyst in the East Financial Advisory Pool. In this role, Matt provided analytical and quantitative support on a broad range of capital markets related services, including capital structure evaluation, risk analysis, debt capacity analysis, rating agency strategy, strategic planning and financial forecasting, and transaction execution.

Matt holds the Chartered Financial Analyst (CFA) designation and is also a member of the CFA Institute and the CFA Society of Philadelphia. He is an active member of PFMillennials, a Significant Interest Group focused on promoting productivity, innovation, and relationship building across all generations in the workplace. In the community, he mentors local Philadelphia residents through the ACHIEVEability Mentoring Program.



Contact

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Specialties

Asset Management

State & Local Governments,
Endowments & Foundations

Education

B.A. in Economics
University of Pittsburgh

B.S.B.A. in Finance
University of Pittsburgh

Certificate in Leadership and
Ethics
University of Pittsburgh

Professional Designations or Licenses

FINRA Series 6 and 63

Chartered Financial Analyst
(CFA)

Started with PFM: 2018

Started in the Field: 2018