



Owen Gerard, CFA

Senior Managing Consultant
PFM Financial Advisors LLC

Owen is a senior managing consultant in the Des Moines office and has been providing highly tailored solutions for municipalities in the Midwest since 2014. He manages client engagements throughout Iowa, Missouri, Kansas and Nebraska where he is an expert in executing debt transactions under many different structures and security types including general obligation, utility revenue, sales tax revenue, TIF revenue, lease purchase and annual appropriation among others.

Owen is a vital resource to many school districts, cities, counties and state-level issuers, and is known for his efficient transaction execution and creative problem-solving ability. In addition to debt issuance management, Owen provides regular on-going financial planning advice to many clients throughout the year including capital planning, credit rating management, utility rate studies, and long-term financial modeling.

As a regular speaker at industry conferences Owen stays abreast of new and innovative financing techniques and communicates those strategies to various groups including the Iowa League of Cities, Iowa Association of School Business Officials and Missouri League of Cities. Owen graduated from the University of Iowa with a Bachelor of Business Administration in Finance in 2011 and is currently pursuing a Master of Business Administration degree from the University of Iowa. In addition, Owen holds the Chartered Financial Analyst designation and is the Past President of CFA Society Iowa.



Contact

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Specialties

Financial Advisory

State & Local Governments, K-12 Schools

Education

B.B.A.
University of Iowa

Professional Designations or Licenses

Municipal Advisor
Representative (Series 50)

Chartered Financial Analyst
(CFA)

Started with PFM: 2014

Started in the Field: 2011