



Steven Alexander, CTP, CGFO, CPPT

Managing Director

PFM Asset Management LLC



Steven Alexander is a managing director in the Orlando office and is responsible for creating and co-directing PFM's investment advisory and treasury management business in the South. He currently provides investment advisory services to a variety of organizations including local governments and nonprofits, as well as the Outsourced Chief Investment Officer multi-asset class investment management services. He established the Trusted Advisor Certificate Training Program (TAP), in conjunction with the Crummer Graduate School of Business Rollins College.

Currently, Steven serves on the Investment Policy Certification Committee for the Association of Public Treasurers of the United States, and has served as a Government Finance Officers Association (GFOA) Standing Advisor for the Treasury and Investment Management Committee. He is the vice chairman of the Stetson University Board of Trustees, and is a member of the Association of Governing Boards of Universities and Colleges. He serves on the Board of Directors of the Florida Hospital Foundation Cardiovascular Institute, Central Florida Coalition for the Homeless and the Orlando Regional Chamber of Commerce.

Steven is a member of the International Business Honor Society Beta Gamma Sigma and holds a mini-MBA from Rollins College Crummer Graduate School of Business. He completed the University of Notre Dame Mendoza College of Business Nonprofit Executive Management Program and the Endowment Institute at Yale University's School of Management.

Contact

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Specialties

Specialized Services, Asset Management

State & Local Governments, K-12 Schools, Endowments & Foundations

Education

B.B.A. in Finance
Stetson University

B.S. in Accounting
Florida Southern College

Professional Designations or Licenses

FINRA Series 6 & 63 licenses

Certified Treasury Professional (CTP)

Certified Government Finance Officer (CGFO)

Certified Public Pension Trustee (CPPT)

Started with PFM: 1996

Started in the Field: 1986