



Sarah Latch

Senior Managing Consultant
PFM Asset Management LLC

Sarah Latch joined PFM's Arbitrage and Tax Compliance Group in 2016, was promoted to senior analyst in 2018, and is currently a senior managing consultant. She provides comprehensive arbitrage rebate compliance services to tax-exempt issuers on a nation-wide basis. Sarah performs arbitrage rebate calculations, yield restriction compliance analysis, post-issuance compliance consulting, and other arbitrage related services, in addition to serving as a verification agent for the issuance of refunding bonds and the corresponding escrow transactions. Sarah manages the arbitrage rebate compliance services provided to the Mid-West local government investment pool programs. Moreover, she leads the Arbitrage and Tax Compliance Group's training efforts for new interns, analysts, colleagues, and clients.

Sarah has experience working with various tax-exempt issues from municipalities, educational institutions, transportation authorities, healthcare systems, states and numerous others. She has provided analysis on fixed rate and variable rate debt, commercial paper programs, arbitrage rebate liability optimization strategies, liability forecasts, and more.

Sarah graduated *summa cum laude* with a bachelor's degree from the Honors Program at Shippensburg University. At Shippensburg University, she was a member of the NCAA Division II Cross Country and Track and Field teams and was President of the Honors Student Organization.



Contact

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Specialties

Asset Management

Education

B.S. in Economics and
Political Science
Honors Program
Shippensburg University

Professional Designations or Licenses

2021 Level III CFA Candidate

Started with PFM: 2016

Started in the Field: 2016