



## Carole Loehr

Senior Managing Consultant  
PFM Asset Management LLC

Carole Loehr joined PFM in 2004 when PFM acquired Ambac Securities, previously Cadre Securities. She specializes in advising school districts and counties in Minnesota, and serves as the senior marketing representative for two PFM-managed local government investment pools (LGIPs) in Minnesota. In her role, Carole pairs clients' cash management and other investment needs with PFM's suite of services, including LGIPs, fixed-rate investments, bond proceeds investments, and separate account management.

Prior to joining PFM, Carole was the supervisor of accounting at the St. Cloud Area School District for thirteen years and a shared accountant with Central Minnesota Education Research and Development Council (ESV Region III) for six years. Her experience includes financial accounting, reporting, budgeting, cash flow forecasting, investing and working closely with local school districts.

Carole's proudest professional achievement is receiving the 2012 MASBO Associate Leaders Award in recognition of her outstanding support of MASBO and exceptional contribution in the advancement of the school business profession. Outside of work Carole enjoys spending time with her family, especially her two grandsons.



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### Contact

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### Specialties

Asset Management

State & Local Governments

### Education

B.A. in Accounting  
The College of St. Benedict

### Professional Designations or Licenses

FINRA Series 7 and 63  
Licenses

**Started with PFM:** 2004

**Started in the Field:** 1981