



## Daniel Lupia

Senior Analyst

PFM Group Consulting LLC

Daniel Lupia is a senior analyst in PFM's Harrisburg office. He started at PFM in July 2016 and spent three years in the company's rotational program, specializing in all aspects of asset management for fixed income portfolios before pivoting to the treasury consulting practice in 2019.

Daniel is primarily focused on public sector clients, including governmental, higher education, and healthcare entities. He is responsible for analyzing bank services and fees, as well as conducting banking industry research. Daniel maintains several of our bank-specific databases which we use to monitor developments in banking technology and contributes to our industry-wide database of bank pricing.

Daniel takes the lead on many client communications and is heavily involved with drafting RFPs for banking services and evaluating proposal responses on behalf of our clients. Most recently, Daniel has been the lead analyst on engagements for James Madison University, Baptist Health System, Hunterdon Health System, The City and County of San Francisco, the City of Riverside, California, and Clark County, Washington, in addition to several other clients who are currently in the process of releasing their RFPs.

Daniel graduated from Lafayette College with a Bachelor of Arts degree in Economics with a concentration in finance and International Affairs. He holds the Certified Treasury Professional (CTP) designation, the CFA Investment Foundations Certificate, as well as the Bloomberg Market Concepts Certificate. He is also Chair and Co-Founder of PFM's significant interest group for the LGBTQ community.



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### Contact

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### Specialties

Consulting

### Education

B.A. in Economics and  
International Affairs  
Lafayette College

### Professional Designations or Licenses

Certified Treasury Professional  
(CTP)

**Started with PFM:** 2016

**Started in the Field:** 2016

