



David Walters, CFA, CTP

Director

PFM Group Consulting LLC

David Walters joined PFM in 2007 and is a director in the Milwaukee, Wisconsin office. David leads PFM's treasury consulting team, partnering with complex organizations nationwide – including higher education institutions, cities and counties, state governments, and health systems – to review and enhance their cash management program. He works closely with clients to independently evaluate existing banking relationships and treasury operations.

As a treasury expert, he develops customized recommendations for process improvements and potential new services for his clients. David also manages competitive procurement processes for comprehensive banking services to ensure organizations are matched with appropriate service providers and utilizing the right set of treasury services while controlling costs. David is a frequent speaker on treasury topics at industry conferences and educational events.

David graduated *magna cum laude* with a Bachelor of Science degree in Finance with a minor in Business Law from the Pennsylvania State University. He holds the Chartered Financial Analyst (CFA) and Certified Treasury Professional (CTP) designations and is a member of the CFA Institute and the CFA Society of Milwaukee. He is also Chair and Co-Founder of PFM's significant interest group for Parents and Caregivers.



Contact

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Specialties

Consulting

Higher Education, State &
Local Governments

Education

B.S. in Finance
Minor in Business Law
Pennsylvania State University

Professional Designations or Licenses

Chartered Financial Analyst
(CFA)
Certified Treasury Professional
(CTP)

Started with PFM: 2007

Started in the Field: 2007