



## Daniel Berger

Director

PFM Financial Advisors LLC



Daniel Berger is the director of applications development for Whitebirch, PFM's proprietary financial modeling platform. Whitebirch is a cloud-based software offering, which helps public and for-profit institutions develop customized financial and strategic planning solutions in real-time.

Dan has developed and manages a suite of products built on the Whitebirch platform which deliver out-of-the-box planning solutions specific to many of PFM's public sector markets – which quickly deliver to CFOs, Finance Directors, City Councils, and Boards the ability to isolate and analyze threats and opportunities in their financial future.

As Whitebirch's product manager, Dan determines and develops the features and functionality that are incorporated into these product offerings. This entails monitoring client usage of and feedback on the various products, overseeing the design and testing of product enhancements, and developing new ideas to build and offer to clients – ultimately Dan is responsible for creating the best possible 'Whitebirch user experience'. He also leads development for new products built on the Whitebirch platform.

Prior to working in Whitebirch, Dan served as a registered Municipal Advisor within PFM's Quantitative Strategies Group. During that time, Dan provided financial advice for a broad range of clients across PFM, focusing on the debt transactions within the firm that were particularly complex or technical in nature.

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### Contact

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### Specialties

Financial Modeling

K-12 Schools, State & Local  
Governments

### Education

B.S.E. in Computer Science  
Engineering  
University of Pennsylvania

### Professional Designations or Licenses

Municipal Advisor  
Representative (Series 50)

**Started with PFM:** 2010

**Started in the Field:** 2007