



Daniel H. Kozloff

Managing Director

PFM Financial Advisors LLC

Dan is a managing director in PFM's Philadelphia office and manager of the Quantitative Strategies Group, a dedicated group of professionals who provide primary technical, new product, transactional and modeling solutions for clients and develop proprietary analytical tools used throughout PFM's various business practices. Dan also oversees the firm-wide training program, including comprehensive sessions for new hires, current employees, lateral hires, and clients.

He leads and manages PFM's Research Group, a centralized source of data and research for PFM's national financial advisory practice. Dan also leads PFM's Tobacco Securitization Group, PFM's efforts in state-level unemployment compensation solutions, and is a co-leader of PFM's Center for Retirement Finance.

Dan has provided primary transactional support on various complex refunding and new money issues for the Commonwealth of Pennsylvania (the Commonwealth); the States of Michigan, Ohio, New York, New Jersey, Washington and Nevada; and New York City. He was involved in the comprehensive restructuring of the Commonwealth's Public Education Funding System and state-wide tax reform to supplement the Commonwealth's Education Funding. Dan advised the Commonwealth on approximately \$18 billion of debt issuance.

Dan serves as financial advisor to Philadelphia-area governments, authorities and institutions, including Montgomery County, Lower Merion Township, Radnor Township, Girard Estate and College, as well as Centre County and Pennsylvania State University.



Contact

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Specialties

Financial Advisory, Specialized Services

State & Local Governments,
Higher Education

Education

B.A. in Political Science
University of Pennsylvania

Professional Designations or Licenses

Municipal Advisor
Representative (Series 50)

Started with PFM: 1999

Started in the Field: 1999