



David Walters, CFA, CTP

Director

PFM Asset Management LLC

David Walters joined PFM in 2007 and is a director in the Milwaukee, Wisconsin office. David is a project manager in PFM's Treasury Consulting team, working with clients nationwide to review and enhance their cash management program. He provides clients with an independent analysis of their banking relationships, recommendations for process improvements and assistance with the competitive procurement of banking services.

Prior to joining the Treasury Consulting practice, David was a member of PFM's Arbitrage and Tax Compliance Group, specializing in providing post-issuance tax compliance services to issuers of tax-advantaged debt. David worked with issuers to help them understand complex arbitrage requirements and ease the burden of compliance. As part of his efforts to educate issuers, he has spoken on arbitrage rebate and post-issuance compliance topics at industry conferences and educational events across the country.

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.



Contact

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Specialties

Specialized Services, Asset Management

Higher Education, State & Local Governments

Education

B.S. in Finance
with 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