



Eric Simpson

Senior Managing Consultant
PFM Asset Management LLC

Eric joined PFM in 2008, where he served as an intern for four years prior. In 2018, Eric transitioned to a team lead within our analyst pool program. He is focused on training and managing analysts who specialize servicing clients in the Mid-West and Western states of the country. In this capacity, Eric is responsible for managing the creation and distribution of a variety of work products in support of relationship managers, with respect to their ongoing client service and business development needs. In addition to his management responsibilities, Eric also serves as a technical and analytical resource for clients related to customized investment reporting, cash flow modeling, portfolio analysis, investment performance and investment policy best practices.

Prior to leading the analyst pool program, Eric worked within the investment accounting department. While a part of the investment accounting team his responsibilities included supporting PFM's separately managed accounts and multi-asset class management products.



Contact

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Specialties

Asset Management

State & Local Governments

Education

B.S. in Business Management
with a concentration in Human
Resource Management
Johnson & Wales University

Professional Designations or Licenses

FINRA Series 6 & 63

Started with PFM: 2008

Started in the Field: 2008