



Helen Klebe

Senior Managing Consultant
PFM Asset Management LLC

Helen Klebe joined PFM as team leader for the accounting pool team in 2007, where she and her team of accountants reconcile funds for 17 pool programs and the registered investment company. Their daily tasks include processing shareholder transactions, trades, and income payments; updating security information; evaluating yields and portfolio turnover; delivering WAM/WAL values; and processing liquidity requirements in an efficient way to meet specific investor deadlines daily.

Before joining PFM, Helen spent eight years in fund accounting and client relationship management at Bank of New York, half a year of which she spent in London, serving on the JP Morgan relationship team.



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Specialties

Asset Management

Education

B.S. in Criminal Justice
with a minor in Economics
Rutgers University

Started with PFM: 2007

Started in the Field: 1999