



Jeffrey Schroeder

Managing Director

PFM Asset Management LLC

Jeffrey Schroeder is a managing director for PFM where he leads the Asset Management teams in Illinois and Wisconsin. Jeff also directly serves key governmental clients in the Midwest practice. In this role, he helps school districts, colleges and universities, municipalities, counties and other public authorities with their investment needs. Jeff ensures that the client's investment objectives and cash flow needs are integrated into the investment strategy developed by the portfolio manager and the Portfolio Strategies Group. Additionally, Jeff is active and has been successful in expanding state investment statutes for the benefit of governmental investors. Jeff is a member of GFOA, ILGFOA, IASBO, ICCCF, IMTA, WGFOA and is an active presenter and moderator at various industry conferences and events.

Furthermore, Jeff is on the board of directors of the Intercultural Montessori School of Chicago and serves on its executive and finance committees.



Contact

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Specialties

Asset Management

Higher Education, State &
Local Governments, K-12
Schools

Education

B.S. in Business
Administration
with a concentration in Finance
Valparaiso University

MBA

Northern Illinois University

Professional Designations or Licenses

FINRA Series 7 and 63
Licenses

Started with PFM: 2007

Started in the Field: 1992