



Katherine Clupper

Managing Director

PFM Financial Advisors LLC

Katherine Clupper is a managing director based in the firm's Philadelphia office. Her expertise is wide ranging, including financial planning and debt transaction management and she works with a diverse list of issuers in the Mid-Atlantic region. She also assists in the development of non-profit and higher education clients in Pennsylvania, Maryland, New Jersey and Delaware.

Katherine brings 30 years of experience working for investment banking firms, financial advisory firms and as an issue manager in Philadelphia. She was the assistant to the director of finance for the City of Philadelphia where she worked for the city treasurer's office in debt management, acting as issue manager for approximately one billion dollars of securities. She also worked for the Pennsylvania State Legislature.

She works with several large state and regional issuers such as the Pennsylvania Industrial Development Authority, City of Philadelphia, Commonwealth Financing Authority and the City of Baltimore. She provides financial advisory services to non-profit and higher education organizations such as Temple University, Drexel University and several secondary schools. Katherine has assisted her clients in successfully entering into the public markets, implementing best practices in managing their debt portfolio, analyzing and developing credit and long-term asset/liability strategies.

Katherine currently serves on the board of directors of the Urban Affairs Coalition and the Committee of 70. She is also serves on the Board of the Forum of Executive Women.



Contact

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Specialties

Financial Advisory

Environmental Utilities, State &
Local Governments, Higher
Education

Education

B.S.W.
Shippensburg University

MBA
Temple University

Professional Designations or Licenses

Municipal Advisor
Representative (Series 50)

Started with PFM: 2003

Started in the Field: 1987