



## Kathleen Walters, CFA

Director

PFM Asset Management LLC

Kathleen Walters rejoined PFM in 2015. She provides investment advisory services to multi-asset class and fixed income clients throughout PFM's Midwest region. Kathleen's responsibilities include modeling cash flows, assisting clients with developing and implementing investment strategies, reviewing performance, updating policies, and marketing PFM products to prospects.

She briefly worked at an investment consulting firm in the Midwest, where she was the lead fixed income research analyst on its research team. In that role, she was responsible for monitoring and recommending fixed income investment strategies. Her role and responsibilities included ongoing manager due diligence during in-person meetings, conference calls, onsite visits, as well as other investment research.

She holds the Chartered Financial Analyst (CFA) designation and is a Board member of the CFA Society of Milwaukee. She is also the Chair of PFM's Women's Network and the founding member of PFM's Parents and Caregivers' Forum.



---

### Contact

115 South 84th Street  
Suite 315  
Milwaukee, WI 53214

waltersk@pfm.com  
414.847.5585 office

### Specialties

Asset Management

State & Local Governments,  
Higher Education

### Education

B.A. in Economics  
Yale University

### Professional Designations or Licenses

Chartered Financial Analyst  
(CFA)

FINRA Series 6 and 63  
Licenses

**Started with PFM:** 2009

**Started in the Field:** 2009