



Owen Gerard, CFA

Senior Managing Consultant
PFM Financial Advisors LLC

Owen is a senior managing consultant in the Des Moines office and has more than six years of experience providing financial advisory services to cities, school districts, counties and state issuers. He has taken an active role in partnering with clients to provide technical and quantitative advice for financial planning and debt issuance for clients within the states of Iowa, Missouri and Kansas. Owen has extensive expertise in conducting competitive bond sales and negotiating pricings for both tax-exempt and taxable new money and refunding bond issues.

Additionally, Owen provides primary analytic support for PFM's engagement with the Kansas Department of Transportation (KDOT). In August 2014, PFM assisted KDOT in the execution of refunding the then outstanding Series 2002 B&C variable-rate obligations with \$212.9 million of floating-rate notes indexed to one-month LIBOR. He provided extensive quantitative support in structuring the refunding issue, and also assisted in facilitating the many activities of the working group. KDOT refunded the variable-rate obligations to eliminate bank renewal risk, as well as remarketing, tax and basis risks, while also realizing more than \$3 million in net present value savings.

Owen graduated from the University of Iowa with a Bachelors of Business Administration in Finance in 2011 and is currently pursuing a Master of Business Administration degree from the University of Iowa. In addition, Owen holds the Chartered Financial Analyst designation and serves as President of CFA Society Iowa and is a committee member for Junior Achievement of Central Iowa.



Contact

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Specialties

Financial Advisory

State & Local Governments, K-12 Schools

Education

B.B.A.
University of Iowa

Professional Designations or Licenses

Municipal Advisor
Representative (Series 50)

Chartered Financial Analyst
(CFA)

Started with PFM: 2014

Started in the Field: 2011