



Richard Pengelly, CFA, CTP

Director

PFM Asset Management LLC

As a director in the Orlando office, Richard Pengelly provides a broad range of investment advisory and portfolio management services to local governments and non-profit organizations. He has worked with all types of public sector investment portfolios including bond proceeds, long-term reserve funds, operating funds and statewide pools.

Richard has more than 21 years of experience providing investment and financial management expertise to public sector entities nationwide. He has served as a Government Finance Officers Association (GFOA) instructor on public investing as well as a financial products panelist for several municipal industry conferences. Throughout his career, he has developed investment and hedging strategies for numerous high profile transactions, including one that was a Non-Traditional Innovative Financing Deal of the Year award winner from The Bond Buyer.

Prior to joining PFM, Richard was head of municipal structuring for the Jefferies Municipal Securities Group, where his primary focus was structuring and executing financial product strategies with a heavy emphasis on reducing financial portfolio risks for municipalities.



Contact

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Specialties

Asset Management

K-12 Schools, State & Local
Governments

Education

B.S. in Physics
Harvard University

Professional Designations or Licenses

FINRA Series 6, 7, 53 and 63
Licenses

Chartered Financial Analyst
(CFA)

Certified Treasury Professional
(CTP)

Started with PFM: 2009

Started in the Field: 1995