

Jim Link, CEBS

Managing Director

PFM Asset Management LLC

Jim Link currently serves as the head of the institutional outsourced chief investment officer (OCIO) team. He oversees all functions related to delivering OCIO solutions to clients including sales, marketing, investments, product solutions, operations and reporting. The OCIO team works collaboratively with colleagues to help clients solve complex financial and asset management challenges enabling each client to fulfill its mission.

Prior to leading the OCIO business, Jim held senior sales, marketing, client management and business leadership roles within PFAM and at several financial firms. Jim has been an active participant in the retirement industry in the U.S. He was an advisor to the Government Finance Officers Association (GFOA) Committee on Retirement and Benefits Administration (CORBA) from 2012 through 2018. Jim was a member of the National Association of Government Defined Contribution Administrators (NAGDCA) Industry Committee from 2010 through 2017 serving as President in 2016 and organizational Board member in 2016 and 2017.

Jim has authored or co-authored publications on U.S. state and local government retirement plan issues. He has also been an active presenter, moderator and instructor at various industry conferences and events. Within the community, he is actively involved as a Board Member for the Pennsylvania Academy of the Fine Arts as a supporter of the Andalusia Foundation.



Contact

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Specialties

Multi Manager Mutual Funds,
Outsourced Chief Investment
Officer (OCIO)

Pensions & Other Post-
Employment Benefits (OPEB)

Education

B.S. in Economics
Texas A&M University

Professional Designations or Licenses

FINRA Series 6 and 63
Licenses
Certified Employee Benefit
Specialist (CEBS)

Started with PFM: 2006

Started in the Field: 1988