

Mitul Patel, CFA, FRM

Director

PFM Asset Management LLC

Mitul Patel joined PFM Asset Management in 2022 and is a senior portfolio manager. He is a member of the portfolio management team that oversees short duration fixed income assets for public entities throughout the country including local government investment pool (LGIP) portfolios and separately managed accounts (SMA). Mitul's responsibilities include developing and implementing investment strategies, portfolio construction, asset allocation, and performing relative value analysis.

Mitul began his career at Blackrock where he spent 12 years in a Short Term Fixed Income portfolio management group focusing on institutional SMAs, Securities Lending Cash Reinvestment accounts, and was involved in management responsibilities of Short Obligation Bond Fund & Cash ETF.

He holds the Chartered Financial Analyst (CFA) and the Financial Risk Manager designation. He is also a member of the CFA Institute and the Global Association of Risk Professionals.



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Contact

213 Market Street
Harrisburg, PA 17101

patelmi@pfmam.com
717.234.3003 office

Specialties

Cash and Enhanced Cash ,
Local Government Investment
Pools (LGIP's)

Higher Education, State &
Local Governments

Education

B.A. in Finance, Risk
Management & Insurance, and
Real Estate
Temple University

M.S. in Finance and
Accounting
Fox School of Business
Temple University

Professional Designations or Licenses

CFA, FRM

Started with PFM: 2022

Started in the Field: 2010