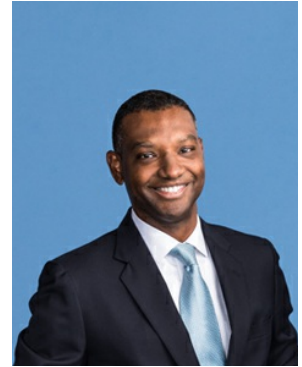


Richard Pengelly, CFA, CIMA, CTP

Managing Director

PFM Asset Management LLC



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

Richard has more than two decades of experience providing investment and financial management expertise to public sector entities nationwide. He has served as an instructor on public investing for the Government Finance Officers Association (GFOA). He has also been a speaker on government investment best practices for numerous industry organizations in the South including the Florida GFOA, the GFOA of Alabama (GFOAA), the Association of Government Accountants Tennessee (AGA), the Florida School Finance Officers Association (FSFOA), the Florida Association of School Business Officials FASBO) and the Florida College System Council of Business Affairs (COBA).

Prior to joining PFM Asset Management, Richard was head of municipal structuring for the Jefferies Municipal Securities Group, where his primary focus was structuring and executing financial product strategies to reduce financial portfolio risks.

Richard holds several designations including the Chartered Financial Analyst (CFA) designation, the Certified Investment Management Analyst (CIMA), and Certified Treasury Professional (CTP) designations. In the community, he serves on the Education Foundation of Osceola County Board of Directors among other nonprofit and volunteer work.

Contact

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Specialties

Higher Education, State & Local Governments, Primary & Secondary Education

Education

B.A. in Physics
Harvard University

Professional Designations or Licenses

FINRA Series 6, 7, 53 and 63 Licenses

Chartered Financial Analyst (CFA)

Certified Investment Management Analyst (CIMA)

Certified Treasury Professional (CTP)

Started with PFM: 2013

Started in the Field: 1995

