



PFM Asset Management LLC Career Opportunity: Client Manager

LOCATION: Orlando Office

COMPANY DESCRIPTION:

PFM Asset Management LLC (“PFMAM”), part of the PFM Group, is nationally recognized as a leading public sector investment advisory firm. We provide cash management, investment management, specialized investment structuring, and consulting services to state and local governments, higher education and health care institutions, public pension plans, foundations and endowments, and Taft-Hartley funds. PFM professionals work with government officials, institutional CFOs, Treasurers, Board-members, investment bankers, attorneys, and other finance professionals to develop and implement investment strategies on behalf of our public and non-profit sector clients. We are a firm of more than 600 professionals located in 41 locations across the country.

OBJECTIVE: The Client Manager is a lead role within the service area and serves as an advocate or bridge between clients, the market and PFM’s internal resources. The Client Manager’s responsibilities are to ensure high touch, proactive customer engagement including meeting and exceeding assigned goals, as designated by the Client Manager. The Client Manager’s specific responsibilities are outlined below.

JOB RESPONSIBILITIES:

- Builds a close consultative relationship of proactive and high-responsiveness to client’s needs, to become the client’s primary advocate and trusted investment advisor.
- Develops a clear understanding of any client needs, product utilization, and other metrics (government and markets) within the client services area.
- Informs and educates PFM clients of all investment capabilities and solutions available to them, including: MACM, Pools, PFM Funds, Arbitrage Rebate, Bond Proceeds, IP Account, CD/Term/Fixed Rate Investments
- Develops in-depth knowledge of the financial markets and economic drivers.
- Acts as a liaison between client services and the different departments within the organization.
- Represents the client service area in the sales and RFP process by preparing up-to-date statistical information. Provides information needed for board materials and meetings.
- Researches and resolves significant client issues, acting as a client advocate by suggesting and formulating creative solutions to any problems.
- Travels as necessary to industry conferences, performing any client facing activities.
- Meets assigned goals through the client service experience.
- Manages Quality Control processes of quarterly performance reports
- Attends client meetings – both in-person and via Webinar – as well as Board and City Council Meetings



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- Investment Policy Formulation and Review – Advocate to update current investment policies
- Address Ad-hoc questions
- Cash Flow Analysis – Advocate to perform for the client and deliver finished product
- Non-Discretionary portfolio recommendations – manage the process and deliver to client

REQUIRED SKILLS:

- Bachelor's degree with at least 3 - 5 years of related financial services, preferably in public sector/municipal finance, sales, banking, investment management, trust or financial services arena.
- Current, active Series 6 & 63 certifications are desired, or candidate must be willing to obtain as a requirement of employment in this role.
- Excellent teamwork, relationship and people skills
- Excellent written and spoken communications skills
- Prior customer service experience with a demonstrated commitment to the establishment of efficient, top-notch customer partnerships
- Attention to detail and accuracy in a dynamic and fast-paced work environment
- Intrinsic sense of urgency, efficiency, and collaboration for interaction with clients, colleagues, and superiors
- Able to quickly learn complex concepts and seamlessly manage multiple priorities

COMPENSATION:

PFM's total rewards package includes a competitive base salary, bonus eligibility, and comprehensive benefits package. PFM also offers the option for participation in profit sharing and 401K plans.

TO APPLY:

To be considered for this position, please visit <https://careers-pfm.icims.com> and submit your resume

PFM is an Equal Opportunity Employer (M/F/D/V) and maintains a drug-free work environment.



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