

Nancy Jones

Managing Director

PFM Asset Management LLC

Nancy Jones joined PFM in January 1989. A Managing Director in the San Francisco office, Nancy is responsible for investment advisory services in California. Nancy works closely with clients to develop customized investment policies and customized portfolio strategies that meet the particular needs of each client. She has conducted numerous workshops and seminars for clients' staff and board members, and for regional and national industry conferences for public agency finance officials, on such subjects as writing an investment policy that works for your agency, red flags to look for when reviewing an investment portfolio, the value of competitively shopping for securities, and how to prepare your portfolio for a rising rate environment. Ms. Jones works closely with CDIAC and has been asked to help write or review portions of CDIAC's Investment Primer. Nancy is a Phi Beta Kappa graduate of the University of California, Berkeley.