

Sarah Walsh

Senior Analyst

PFM Asset Management LLC

Sarah joined PFM Asset Management in 2018 and is the subject matter expert on sustainable and ESG (environmental, social & governance) investing. She assists in building solutions to meet sustainable investing needs and helps clients meet their unique sustainability goals as detailed in their investment policy statements. Her responsibilities also include client education, trade compliance monitoring and reporting. Additionally, she routinely supports a variety of other client needs.

Prior to transitioning to her role in sustainable investing and ESG, Sarah was a part of the rotational analyst program where she gained valuable exposure to various groups and business lines at the firm. Her responsibilities included portfolio analysis, investment policy recommendations, proposal preparation and presentation support.

Sarah holds her FINRA Series 6 and Series 63 licenses. She also completed an ESG Investing course at Columbia Business School in 2022.



Contact

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Specialties

Sustainable Investing , Short &
Intermediate Term Fixed
Income

State & Local Governments

Education

B.A. in Mathematics
Gettysburg College

Professional Designations or Licenses

FINRA Series 6 and 63

Financial Modeling & Valuation
Analyst (FMVA)

Started with PFM: 2018

Started in the Field: 2018