

Debt & Investment Webinar Series:

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Current Banking Environment and Its Impact on Local Governments

May 6, 2020 | 10:30 a.m. – 11:30 a.m.

Learning Objectives

When you complete this webinar, you should be able to:

- List new services that can be alternatives to existing processes and procedures.
- Recognize how banks charge for services and list alternatives to pay for banking fees.
- Describe how changes in the regulatory environment have impacted how banks view institutional client relationships.

Webinar Description

Banking services are an important cornerstone of cash management for local governments. In recent years, banks have heavily invested in technology to promote digital processes. This session will discuss the advantages and disadvantages of these new technologies, as well as recent trends in the banking industry that have resulted in municipalities considering enhancements to their banking relationships.

David Calvert, CFA

Director | calvertd@pfm.com



David Calvert has been with PFM for over 18 years, specializing in providing treasury consulting services for clients across the country. As a leader of PFM's Treasury Consulting practice, he helps clients evaluate their banking needs, which typically results in significant cost savings, new and improved services, and greater customer service for his clients. David earned an M.S. in Finance from Boston College and a B.S. in Business Administration with a concentration in Finance and Accounting from Bloomsburg University.

David Walters, CFA, CTP

Senior Managing Consultant | waltersd@pfm.com



David Walters has been with PFM for over 12 years, specializing in providing treasury consulting services for clients across the country. As a project manager in PFM's Treasury Consulting practice, he provides clients with an independent analysis of their banking relationships, recommendations for process improvements, and assistance with the competitive procurement of banking services. David earned a B.S. in Finance with Business Law from Pennsylvania State University.