



## Brian Carter

Managing Director

PFM Financial Advisors LLC

Brian Carter co-heads the firm's Healthcare team. He primarily serves PFM's acute care healthcare clients as a financial advisor offering advice on corporate strategy, capital structure, and execution in the capital markets. Other clients include non-profits, continuing care retirement communities, and other human service providers.

Brian began his career at PFM in 1999 where he worked with public power clients for four years and in derivatives for two years. His most recent previous experience includes over thirteen years in public finance healthcare investment banking at Wells Fargo Securities where he served institutions including large health systems in New York, Pennsylvania, and New Jersey with negotiated bond sales and mergers and acquisitions. Brian returned to PFM as municipal advisor representative in 2018. Since his return to PFM, he has worked with community hospitals, mid-sized systems, large academic medical centers, and specialty hospitals, as well as senior living, charter schools, and higher education clients.

In his first stint at PFM, he worked with clients in public power including major providers in Massachusetts, Florida, Washington and Georgia as a financial advisor.



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### Contact

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### Specialties

Higher Education, Charitable  
Institutions, Healthcare

Financial Advisory, Alternative  
Finance

### Education

Bachelor of Science, Business  
Administration and Finance  
LaSalle University

### Professional Designations or Licenses

Municipal Advisor  
Representative (Series 50)

**Started with PFM:** 2018

**Started in the Field:** 1999