



(<https://www.pmanetwork.com>)



Services We Offer

Self-Directed Investments

PMA has developed a unique set of investment products and services designed to maintain safety of principal, adequate liquidity and maximize interest earnings with a focus on short-term investment horizons.

[Learn more \(https://www.pmanetwork.com//our-services/investment-services/self-directed-investments/\)](https://www.pmanetwork.com//our-services/investment-services/self-directed-investments/)

Investment Advisory Services

As a fiduciary, Prudent Man Advisors provides customized investment advisory services to public entities and other institutional investors. Offerings include pooled and separately managed account solutions.

[Learn more](https://www.pmanetwork.com//our-services/investment-services/investment-advisory-services/) (https://www.pmanetwork.com//our-services/investment-services/investment-advisory-services/)

Public Finance

PMA Securities' Public Finance Team performs a number of services for its clients, ranging from the development of funding plans for capital projects to facilitating the debt issuance process.

[Learn more](https://www.pmanetwork.com//our-services/public-finance/) (https://www.pmanetwork.com//our-services/public-finance/)

Investment Pool Services (LGIP)

PMA's LGIP services include administration (shareholder recordkeeping and fund accounting), marketing and distribution, investment advisory (through Prudent Man Advisors) and fixed rate investment programs.

[Learn more](https://www.pmanetwork.com//our-services/investment-pool-services-lgips/) (https://www.pmanetwork.com//our-services/investment-pool-services-lgips/)

Who is PMA?



PMA Financial Network, LLC

Leading provider of financial services to the public sector with sound investment solutions since 1984.

[Learn more \(https://www.pmanetwork.com//our-story/our-companies/pma-financial-network-inc/\)](https://www.pmanetwork.com//our-story/our-companies/pma-financial-network-inc/)



PMA Securities, LLC

Registered Broker-Dealer and Municipal Advisor (Member FINRA and SIPC), offering securities, public finance and institutional brokerage services.



Prudent Man Advisors, LLC

an SEC registered Investment Adviser and fiduciary providing investment advisory services to the public sector and other institutional investors.

[Learn more \(https://www.pmanetwork.com//our-story/our-companies/prudent-man-advisors-inc/\)](https://www.pmanetwork.com//our-story/our-companies/prudent-man-advisors-inc/)



PMA Funding

PMA Funding is a service of PMA Financial Network, LLC and PMA Securities, LLC and provides over 1,000 banks with a broad array of cost effective funding alternatives. PMA Funding is designed to help financial institutions develop a diversified funding strategy through reliable funding sources.

[Learn more \(http://pmafunding.com\)](http://pmafunding.com)

**YOY Growth in Assets Under Administration (“AUA”) and
Assets Under Management (“AUM”) in \$Billions**

AUA* (Billions (\$))

AUM** (Billions (\$))

Yearly Highpoint

*Total AUA include both money market pool assets for which the PMA companies serve as fund administrator/accountant, marketer/distributor, fixed income program provider (brokerage services), and/or investment advisory, or separate institutional accounts.

**Prudent Man Advisors provides investment advisory services to public clients. AUM includes the total market value of assets that Prudent Man Advisors manages through investment advisory or separate institutional accounts, on behalf of its clients.

Market Research & Articles



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PMA Articles: April 2019

Current Funding Paradigm: Wholesale Funding Options & the Use of Political Subdivisions

A decade after the great recession, the financial institution landscape has changed greatly. At the onset of the crisis, financial institutions sought to build out diversified liquidity to even the spread of detriment. The uncertainty of the crisis, both in depth and duration, forced financial institutions to secure multiple sources of funding and borrowings that may not have been traditional pre-crisis.

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Frequently Asked Questions

01. Who is PMA?

PMA is a national Firm comprised of three distinct companies, PMA Financial Network, LLC, PMA Securities, LLC, and Prudent Man Advisors, LLC (collectively “the PMA companies”), which together provide customized, integrated financial solutions to the public sector and related entities.

02. Who does PMA serve?

Collectively, the PMA companies serve over 2,500 public entities in eleven (11) states. We are focused almost exclusively on serving the public sector and related entities, which may include school districts, colleges, cities, counties and other municipalities.

03. Does PMA work with Financial Institutions?

Yes! PMA has a Bank Funding division designed exclusively to help banks develop a diversified funding strategy through reliable funding sources. PMA Funding is a service of PMA Financial Network, LLC and PMA Securities, LLC, and provides over 1,000 banks with a broad array of cost effective funding alternatives.

04. How much in total assets does PMA manage/administer?

As of March 31, 2019, the PMA companies had over \$25.2 billion in assets under administration. Total assets under administration include both money market pool assets for which the PMA companies serve as fund administrator/accountant, marketer/distributor, fixed income program provider (brokerage services), and/or investment advisory, or separate institutional account management.

05. How can PMA help my public entity?

The PMA companies offer a full range of products and solutions for public funds management and the public finance manager. We focus on managing risk, solving problems and creating efficiencies for our clients in the public sector. PMA is partner-focused, not product-centric. Our goal is to achieve long-term financial success for our clients.

06. What services does PMA offer?

The PMA companies can provide investment management, fixed income investment products and services, public finance/financial advisory services, as well as comprehensive services for LGIP clients which include portfolio management, fund administration and marketing. In a nutshell, our services include self-directed investments, investment advisory services, public finance and investment pool services (LGIPs).

07. Where is PMA located?

PMA is headquartered in Naperville, IL, but also has office locations in Florida, Iowa, Minnesota and Wisconsin. We have 130+ employees to meet the ongoing needs of our clients. Our addresses and contact info can be found [here](https://www.pmanetwork.com//our-offices/) (https://www.pmanetwork.com//our-offices/).

Integrity.

Performance.®

Upcoming Bond Sales

No current sales at this time.



MEET OUR TEAM

Get to know PMA's leaders who are focused on achieving long-term financial success for our clients.

[VIEW TEAM LEADERS \(HTTPS://WWW.PMANETWORK.COM//TEAM-LEADERS/\)](https://www.pmanetwork.com/team-leaders/)



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DEPARTMENT DIRECTORY

Have a question? Click below for direct access to each of PMA's departments and lines of business

[VIEW EMPLOYEE DIRECTORY \(HTTPS://WWW.PMANETWORK.COM//EMPLOYEE-DIRECTORY/\)](https://www.pmanetwork.com//employee-directory/)

A Note From Our CEO

For more than thirty
years, PMA has evolved
into a comprehensive

financial service provider to public entities while continuing to perform Dr. English's first-of-its-kind and time-tested credit analysis. The Firm's original focus on the safety of public funds and innovation remain foundational to our core values and personality as a business.

Today, our strategic plan is committed to this innovation and service by defining, measuring and aligning targets; while calibrating accordingly through efficiencies and continuous improvement to best serve our valued clients. PMA has always been focused on generating value for its clients, and we have thrived on collaborative effort and an innovative spirit. It is with the hard work and dedication of our staff along with the loyalty of our clients and partners that contribute to the ongoing success of PMA.



JIM DAVIS

CEO

Integrity.

Performance.®


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 (<https://www.linkedin.com/company/pma-network/>)

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