

Takashi Iwata

Takashi's focus, as a financial services non-attorney professional directing the FAS Group, is making sure that the firm's clients are complying with the arbitrage rebate and yield restriction rules and regulations for municipal bonds.

Takashi had worked as an actuary with a Big Four accounting firm where he developed a strong foundation in financial analysis and a high level of proficiency in spreadsheet and database applications.

Takashi has been an essential part of FAS for over 20 years. He has worked on a wide variety of arbitrage rebate and yield restriction matters, including refundings with transferred proceeds, defeasances, penalty in lieu of rebate, pooled financings, parity analysis, universal cap analysis, common fund analysis and investment analysis. He has worked on thousands of arbitrage rebate and yield restriction compliance reports for cities, counties, states, housing authorities, corporations, agencies and school districts.

Takashi is responsible for the overall day-to-day management of arbitrage services and serves as the team leader and primary contact person for the clients of FAS. Mr. Iwata mobilizes the arbitrage team to carry out the engagement in a timely and efficient manner and will coordinate all activities to ensure there is complete integration of bond law, tax law and financial analysis.

Additionally, Takashi has served as a panelist at various conferences on arbitrage rebate and yield restriction matters (e.g., New York State Government Finance Officers Association, Association of Environmental Authorities, California Debt and Investment Advisory Commission and Arbitrage Conferences for Oregon, New York and New Jersey issuers).



CONTACT

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EDUCATION

Rutgers University, B.A.,
Mathematics and Statistics

- **Municipal Bond School 2019, The Municipal Bond Club of New York**
Arbitrage Rebate and Yield Restrictions Compliance
- **California Debt and Investment Advisory Commission**
Arbitrage Rebate and Yield Restriction Compliance
- **Association of Environmental Authorities**
Arbitrage Rebate and Yield Restriction Compliance
- **Government Finance Officers Association**
Arbitrage Rebate and Yield Restriction Compliance
- **New York State Government Finance Officers Association**
Arbitrage Rebate and Yield Restriction Compliance

CHARITABLE & CIVIC ACTIVITIES

Teaching Advance Microsoft Excel to high school students every year as part of the internship program at the Urban Leadership Fellows Program of the Municipal Forum of New York