



George K. Baum & Company (<https://www.gkbaum.com>)

INVESTMENT BANKERS SINCE 1928

George K. Baum Capital Advisors | Mergers & Acquisitions Advisory (/mergers-acquis

Home
(/)

Our People

What We Do

Our Office Locations

About Our Firm

Offerings

Login
(<https://www.gkbaum.com/login>)



Founded in 1928, George K. Baum & Company* is one of the nation's most trusted privately held investment banking firms focused on municipal finance and taxable fixed income sales and trading. We are recognized as an industry leader in the structuring, underwriting and marketing of taxable and tax-exempt securities. As a registered broker-dealer, George K. Baum & Company operates two primary business segments: Municipal Finance and Taxable Fixed Income. Municipal Finance provides underwriting and municipal advisory services to a variety of public and private sectors across the country. Taxable Fixed Income provides direct access to the institutional markets for our customers, giving our professionals the in-depth knowledge and understanding to address the specific needs of our clients and successfully manage their portfolios.

[Housing Market Roundup](#)

[Market Commentary](#)



[\(/home-roundup\)](#)

[The Housing Market Roundup from GKB's National Housing Finance Group. \(/home-roundup\)](#)



[\(/images/pdfs/MarketCommentary/Market_Commentary_8-17-2018.pdf\)](#)

[The GKB Market Commentary on the Treasury & Municipal markets. \(/images/pdfs/MarketCommentary/Market_Commentary_8-17-2018.pdf\)](#)

[HOME \(/\)](#) [LEGAL & COMPLIANCE \(/LEGAL-COMPLIANCE\)](#) [SITE MAP \(/SITE-MAP\)](#)
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*George K. Baum & Company ("GKB" or the "Firm")

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[\(/INDEX.PHP\)](#)

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[\(/REDIRECT-FINRA\)](#)

[\(/REDIRECT-SIPC\)](#)



K-12 Education Finance

George K. Baum & Company provides investment banking services to public schools, charter schools and private primary and secondary schools from coast-to-coast. GKB has a reputation for industry-leading credit rating presentations, securing credit ratings and insurance, developing capital improvement plans, and generating substantial savings through debt re-financing. Members of our team have overseen more than 150 school bond financings totaling approximately \$2.1 billion. Many of our clients (more than 50) have been first-time borrowers, who we have educated on the bond issuance process.



Finance Specialists



(/brad-angst-k-12)



(/david-arteberry-k-12)



(/john-archuleta-k-12)



(/albert-boumenot-chicago-2)



(/todd-burrus-9)



(/don-diones-k-12)

Our Philosophy

INDEPENDENT & OBJECTIVE PERSPECTIVE

George K. Baum & Company is not a direct lender or credit provider, and is not affiliated with a commercial bank. We do not have an incentive to advocate for any particular financing structure. Rather, our primary focus is to offer the best advice to our clients based on their needs. We assist our clients in exploring all of their options and ultimately implement the most accurate plan of finance best suited to meet their individual goals.

Since 2000, our Firm has served as underwriter or municipal advisor for approximately 1,500 primary and secondary school bond financings totaling approximately \$25.5 billion. George K. Baum & Company consistently ranks among the top 10 underwriters of negotiated public K-12 financings in several states throughout the country.

FUNDAMENTAL FINANCIAL STRATEGY & PROCESS

Our goal is to educate our clients on all of their potential financing options while balancing cost, risk and compatibility with the client's goals and philosophy toward the use of debt. In assessing an institution's options, we detail and advise clients on the pros and cons of bank financings and debt issuances sold on the basis of the client's own credit rating.

Our National Presence

CALIFORNIA (<https://www.gkbaum.com/what-we-do/divisions/municipal-finance-division/national-practices/k-12-education#california>)

COLORADO (<https://www.gkbaum.com/what-we-do/divisions/municipal-finance-division/national-practices/k-12-education#colorado>)

INDIANA (<https://www.gkbaum.com/what-we-do/divisions/municipal-finance-division/national-practices/k-12-education#indiana>)

KANSAS & MISSOURI (<https://www.gkbaum.com/what-we-do/divisions/municipal-finance-division/national-practices/k-12-education#kansas-missouri>)

NEW MEXICO (<https://www.gkbaum.com/what-we-do/divisions/municipal-finance-division/national-practices/k-12-education#new-mexico>)

TEXAS (<https://www.gkbaum.com/what-we-do/divisions/municipal-finance-division/national-practices/k-12-education#texas>)

UTAH (<https://www.gkbaum.com/what-we-do/divisions/municipal-finance-division/national-practices/k-12-education#utah>)

Our K-12 Finance professionals provide a wide range of services to our clients. These services include, but are not limited to, the following:



(/matt-dugdale-k-12)



(/rodger-edgar-k-12)



(/larry-englande-k-12)



(/anthony-fratto-k-12)



(/paul-hanley-k-12)



(/brady-hart-k-12)



(/william-hofherr-k-12)



(/joe-kinder-k-12)

(/preston-kirk-k-12)

UNDERWRITING SERVICES

<https://www.gkbaum.com/what-we-do/divisions/municipal-finance-division/national-practices/k-12-education#underwriting-services>

MUNICIPAL ADVISORY SERVICES

<https://www.gkbaum.com/what-we-do/divisions/municipal-finance-division/national-practices/k-12-education#municipal-advisory-services>

DIRECT PLACEMENT FINANCINGS

<https://www.gkbaum.com/what-we-do/divisions/municipal-finance-division/national-practices/k-12-education#direct-placement-financings>

DUAL TRACK FINANCING PROCESS

<https://www.gkbaum.com/what-we-do/divisions/municipal-finance-division/national-practices/k-12-education#dual-track-financing-process>

FINANCIAL PROJECTIONS MODELING

<https://www.gkbaum.com/what-we-do/divisions/municipal-finance-division/national-practices/k-12-education#financial-projections-modeling>

IN-HOUSE QUANTITATIVE CAPABILITIES

<https://www.gkbaum.com/what-we-do/divisions/municipal-finance-division/national-practices/k-12-education#in-house-quantitative-capabilities>

NEW PROJECT FINANCING

<https://www.gkbaum.com/what-we-do/divisions/municipal-finance-division/national-practices/k-12-education#new-project-financing>

RATING AGENCY PRESENTATIONS

<https://www.gkbaum.com/what-we-do/divisions/municipal-finance-division/national-practices/k-12-education#rating-agency-presentations>

REFINANCING & RESTRUCTURING DEBT

<https://www.gkbaum.com/what-we-do/divisions/municipal-finance-division/national-practices/k-12-education#refinancing-restructuring-debt>



(/damian-maggos-k-12)



(/robyn-moore-k-12)



(/bret-shogren-k-12)



(/steve-shogren-k-12)



(/todd-snidow-k-12)



(/david-webb-k-12)



(/trish-whitcomb-2)

MARKETING MATERIALS

<https://www.gkbaum.com/what-we-do/divisions/municipal-finance-division/national-practices/k-12-education#marketing->

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[HOME \(/\)](#) [LEGAL & COMPLIANCE \(/LEGAL-COMPLIANCE\)](#) [SITE MAP \(/SITE-MAP\)](#)
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[\(/INDEX.PHP\)](#)

[\(/REDIRECT-BROKERCHECK\)](#)

[\(/REDIRECT-FINRA\)](#)

[\(/REDIRECT-SIPC\)](#)