



Kaiti Wang

Kaiti Wang, CFA®

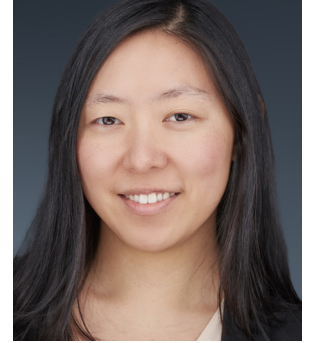
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“Education opened doors for me. It is my hope that my work in education will help open doors for others as it did for me.”

A self-proclaimed ‘east coaster,’ Kaiti Wang grew up in southern California, attended the University of California, Berkeley and lived and worked in the Bay Area for many years before making her new home in the New York region. What Kaiti loves most about the east coast is the fact that time has a pattern – the sights, sounds and smells of each season marking the evolution of the year. Similar to her appreciation for the unique qualities of each season, Kaiti is drawn to the various challenges and opportunities inherent in public finance education.

Prior to joining HJ Sims, Kaiti had experience in municipal analyst roles with S&P Global Ratings, a credit rating agency which opines on a borrower’s ability and willingness to repay its investors. S&P is considered the largest of the Big Three credit-rating agencies. Kaiti has broad credit analysis experience with municipal tax-backed debt and revenue debt for a variety of public entities including municipalities, special tax districts, higher education institutions, independent schools, and more.

While conducting credit analysis and research at S&P, Kaiti was introduced to the education sector and found that each charter school has a unique story and faces varied challenges in fulfilling its mission to educate students. Kaiti has evaluated the credit profiles of the more than 300 S&P-rated charter schools, equipping her with a tremendous overview of the charter school market in the rated universe of public finance education. During her tenure at S&P, Kaiti authored the annual S&P charter school medians publication in 2018 and 2019, and presented the related live webcast.

Kaiti admires the innovative ways in which charter school leaders deliver education, while frequently having to find ways to overcome funding and space shortages to provide education options to their communities. This may take the shape of an acquisition, build or renovation of a property to serve as a school; and these leaders tend to have education backgrounds and training, but often find themselves with real estate development responsibilities before they can refocus on educating.

Following her time at S&P, Kaiti sought experience that would provide her with direct involvement in helping charter schools with their financing goals – typically to address the need for their own, permanent building in their communities. She served as a Loan Officer with Local Initiatives Support Corporation (LISC), a non-profit Community Development Financial Institution where she underwrote loans to high quality charter schools seeking funds to meet acquisition, pre-development, construction, and leasehold improvement needs for their school buildings. She also served as the Program Officer for the Spark Opportunity Grant Program which awarded 47 charter schools throughout the country with pre-development grants to move their facilities/projects to the next stage – and opening Kaiti’s eyes to the myriad of real estate development and financing hurdles confronted by school leaders.



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Working so closely with charter schools and the communities they serve motivates Kaiti. It is her hope that education continues to open doors for children across the nation, as it did for her.

Kaiti enjoys pursuing continuous learning. She is bilingual in English and Chinese. Since graduating from UC Berkeley with a Bachelor of Arts in Economics, she earned her CFA charterholder designation, and completed a Commercial Real Estate Loan Underwriting course. When she is not working or learning, you can find Kaiti exploring as much of the east coast as she can, whether it is hiking in Maine or New Hampshire or exploring the cultural enclaves of New York. She is also often taste-testing along her journeys, enjoying the foods of each neighborhood, town or city.