

Donna Wilson

Portfolio Management, New York



When did you first become interested in asset management?

My first job after getting an MBA from Wharton was with JPMorgan Securities – fixed income sales. While I did that job well and liked the paycheck, I knew it wasn't the right fit for me. However, as I learned more about my client (the PM) and asset management industry, I knew that it was where I belonged. So my journey to asset management was intentional – it didn't fall in my lap.

Historically, asset management firms tended not to recruit heavily from business schools, so the industry wasn't on my radar. It was a well-kept secret and entry was tough. Even at JPMorgan, the opportunity to move to the asset management from the securities subsidiary was rare. Asset management was a special club. On my quest to portfolio management, I moved to General Motors Asset Management, which at that time was the largest corporate pension fund in the US, with huge defined contribution assets. In that decision-making

position, I sat across the table from the best asset managers in the US – fixed income and equity. I still consider that experience integral to how I make decisions today. From that role, I eventually moved to an investment role at one of Invesco's predecessor firms.

Why do you think there are so few women in investment management? How might that change in the future.

The industry is not well known. Financial services (accounting, banking, brokerage, insurance, fintech) tend to heavily recruit and offer training, making them a better fit for new graduates. Good internships are rare. Many asset managers are boutiques or owned by either diversified financials or insurance companies – not independent, publicly traded asset management firms, like Invesco. So, it's easier to be recruited into financial services and still not be aware of the asset management group within. If you don't know anyone in the industry who can provide guidance and open a door – it's tough. But we've turned the corner and awareness is evolving given the needs of our clients and demographic shifts. Thankfully, we are seeing more women in senior roles at our clients – decision makers - who are asking for our diversity philosophy. In addition, our institutional clients are asking for the "numbers" – not only gender but racial diversity - as part of their due diligence when hiring and where ongoing reporting is required. In recent years, it's moved beyond a simple count metric to looking at percent of professional population and seniority metrics.

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Investing is not just for the rich anymore – it's the only way to secure a comfortable retirement. Demographics are in our favor - more women are college educated professionals, head of households, have longer life expectancies, are accumulating wealth and need asset management services. In turn, awareness for professional opportunities in the industry will increase. But key to successful recruitment is development and engagement efforts. The great news is that Invesco can look inside their current pool of professionals and develop them into managerial roles across our business lines, with a keen eye on our investment teams – the heart of our business. As investors we should invest in our people. Managers should be accountable for creating diverse teams and offering advancement opportunities. In my view, it may not happen naturally – so it should be intentional.

Invesco's purpose is to help people get more out of life through a superior client experience. What does that mean to you in your role?

Trust, humility, and adaptability are key attributes that can distinguish your skill level. Our clients see us as trusted advisors – we earn that right given years of providing attractive returns, asset allocation or market insights. Humility puts client interests first and our ego last – it's a privilege to be entrusted with our client's assets. We must continue to learn and evolve to be consistently good. Flexibility and adaptability is expected. Our investors have had to adapt to meet the needs of their constituents as well. With active management, conviction is very important but you still must continually earn your spot in your client's portfolio.



What do you find most valuable about the Invesco Women's Network?

I'm proud to say that I am one of the founding members of IWN. I am member of the governance committee, co-chair of the diversity committee, former chair of IWN's NY Chapter, and a mentor for the iMentor program for the last six years.

Initially, I was happy to connect with other senior women in the firm. But we knew that connection had to be more than a networking organization, so we set goals that were focused on enhancing Invesco's culture by working toward better engagement and development for women at the firm, which would also help to attract more women to Invesco. We knew that these were big goals but would someday also benefit our clients and our shareholders. Today, in less than 10 years, IWN has expanded its reach to local chapters in the US and globally. We have grown to be a significant influencer and integral to Invesco's commitment to gender diversity. These efforts are also being more frequently recognized by our client partners. I'm thankful to all the women at the firm who embrace IWN's mission and get involved to help us achieve our collective goals.

What are some of your personal passions outside your career?

Spending time with my husband and son is my number one priority. My son is in high school and plays varsity football and basketball so to the extent possible, we're cheerleaders. I'm close to my sisters also and active in my church. In 2016, I was elected to the Board of Directors of Women's Bond Club of NY. WBC was founded in 1921, and today there are over 40 corporate member firms (mostly financial services) with over 900 members. Invesco was one the first asset managers to join the organization – BlackRock and PIMCO followed thereafter. I am co-chair of Community Outreach, which is responsible for providing scholarships and mentoring young women during their four years in college and providing grants to organizations that help advance women – from early through mid-career.